C 42.8/2:M82

A SUPPLEMENT TO

International Commerce

UNIVERSITY PARK, PENNSYLVANIA

THE UNIVERSITY LIBRARY
THE PENNSYLVANIA STATE UNIVERSITY
UNIVERSITY PARK, PENNSYLVANIA

MARKET FOR U.S. PRODUCTS IN

MOROCCO

U.S. DEPARTMENT OF COMMERCE / Bureau of International Commerce

A SUPPLEMENT TO

International Commerce

. . . the weekly news magazine for world traders published by the Bureau of International Commerce and sold by the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402, and by Department of Commerce Field Offices for $16 a year.

a market for U.S. products

MOROCCO

A U. S. DEPARTMENT OF COMMERCE PUBLICATION

U.S. DEPARTMENT OF COMMERCE
Luther H. Hodges
Secretary

Franklin D. Roosevelt, Jr.
Under Secretary

Thomas G. Wyman
Acting Assistant Secretary for
Domestic and International Business

BUREAU OF INTERNATIONAL COMMERCE
Eugene M. Braderman
Director

For sale by the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402
Price 40 cents

By

Robert L. Dowell

COMMERCIAL OFFICER
AMERICAN CONSULATE GENERAL
CASABLANCA, MOROCCO

MINOT B. NETTLETON, Economic Officer, American Embassy, Rabat, prepared chapters I, III, IV, V, VII, VIII, IX, and the Notes to the Business Traveler in the appendix.

James F. Green, American Consul General, Casablanca, and Francis C. Prescott, Chief of the Economic Section, American Embassy, Rabat, gave encouragement, advice, and final review. Local staff members at Casablanca and Rabat cooperated wholeheartedly.

Moroccan Government agencies and private businessmen furnished information on official Moroccan publications and unpublished material. Among them, the Central Statistical Service, Rabat, was especially helpful.

The Bureau of International Commerce, U.S. Department of Commerce, Washington, D. C., completed the work necessary for publication.

Foreword

MOROCCO TODAY offers a market of modest but growing proportions for United States exports.

While Morocco purchases a diversified list of goods from abroad, this report emphasizes those commodities which specifically appear to offer the most promising sales opportunities for U.S. business in relation to current government import licensing policies and local market requirements. A substantial U.S. aid program of loans and Public Law 480 Food for Peace shipments have stimulated American exports to Morocco. In fact, by 1963, the United States ranked second only to France as a supplier of Morocco's imports.

Morocco was one of the first of the new African states to be formed in the post-war period. Formal separation from France was achieved in 1956 with the establishment of the independent Kingdom of Morocco. Since then, the young country has focused its energies increasingly in the direction of economic development in an effort to expand employment and income.

Government planning is emphasizing the modernization of Morocco's traditional agrarian economy as well as introduction of new industries. These programs create an opportunity for participation by foreign private capital and also create expanded markets for foreign goods and services in which American business can and should share.

Eugene M. Braderman

EUGENE M. BRADERMAN
Director, Bureau of International Commerce

September 1964

Contents

Page

Acknowledgment ii

Foreword iii

Market Indicators—Morocco vi

CHAPTERS

I. Character of the Moroccan Market viii
- Importance of Market 1
- Composition of Market 1
- Trends of Foreign Trade 3
- U. S. Share of Market 3

II. Market for Selected Commodities 6
- Agricultural Products 7
- Chemicals and Drugs 9
- Equipment and Machinery 10
- Miscellaneous Products 16

III. Economic Development Programs 21
- Development Planning 21
- Development Agencies 22
- French Aid 23
- American Aid 24
- U.N. and Other Aid 25

IV. Basic Data On Morocco 26
- Geography 27
- Climate 29
- People 29
- Population 29

V. Channels of Distribution 30
- Principal Centers 30
- Railways 31
- Roads 32
- Air Transport 32
- Ports 32

VI. Trade Practices 34
- Importing Methods 34
- Quotations and Terms 35
- Credit Facilities 37
- Trade Customs 37
- Government Procurement 39

VII. Import Regulations 40
- Import Licensing 40
- Exchange Controls 41
- Import Tariffs 42

VIII. Marketing Aids 44
- U. S. Publications and Services 44
- Trade Associations 46
- Fairs 46
- Official Representation 47
- Advertising 47

TABLES

Page

1. National Income, 1952, 1956, 1960, and 1963 50
2. Moroccan Foreign Trade, First 15 Countries, 1956, 1960, and 1963 50
3. Moroccan Foreign Trade by Major Trading Areas, 1956, 1960-63 51
4. Trade Balance by Major Trading Area, 1956, 1960-63 51
5. Balance of Payments, 1956, 1960-62, and Estimated 1963 51
6. Imports and Exports by Commodity Group, by Percent Change Between 1956 and 1963 51
7. Moroccan Imports and Imports from the United States of Agricultural and Nonagricultural Products, 1956, 1960-63 52
8. Moroccan Imports of Selected Commodities, 1956 and 1960-63 52
9. Value of Selected Agricultural Product Imports, 1956, 1960-63 54
10. Value of Chemical and Fertilizer Imports, 1956, 1960-63 54
11. Value of Imports of Packaging, Handling, and Conveying Equipment, 1956, 1960-63 54
12. Value of Imports of Diesel and Gasoline Engines, 1956, 1960-63 54
13. Value of Selected Electrical Equipment Imports, 1956, 1960-63 55
14. Value of Imports of Communications and Related Equipment, 1956, 1960-63 55
15. Value of Copper and Aluminum Imports, 1956, 1960-63 55
16. Value of Textile Imports, 1956, 1960-63 55
17. Value of Primary Paper Imports, 1956, 1960-63 55
18. Value of Rubber and Rubber Products Imports, 1956, 1960-63 55
19. Average Temperatures and Annual Rainfall in Selected Cities 55
20. Population Growth, 1936, 1952, 1956, 1960, 1964, 1970 56
21. Urban and Rural Population, 1960, 1964 56
22. Population by Age Groups, 1960, 1964, 1970 56
23. Estimate of Active Population by Industry Group, 1964 56
24. Selected Moroccan Ports, Quantity of Exports and Imports, 1963 56
25. Cargo Movement, Port of Casablanca, by Selected Categories, 1952, 1956, 1960, 1963 56
26. Number of Ships Entering Casablanca and Their Tonnage, 1939, 1948, 1952, 1956, 1960, 1963 56

APPENDIXES

A. Notes to The Business Traveler 48
- Hotel Accommodations 48
- Food and Clothing 48
- Local Transportation 48
- Passports and Visas 48

B. Bibliography 49

CHARTS

Morocco Buys From Abroad 2
Morocco Sells Abroad 4

MAPS

Location vi
Political vii
Population 28
Mineral 36

Market Indicators—Morocco

FOREIGN TRADE

	Value, in millions of dollars		
	1961	*1962*	*1963*
Imports, total, c.i.f	452	430	449
Exports, total, f.o.b.	346	353	389
Imports from United States, c.i.f.	47	58	45
Exports to United States, f.o.b.	10	10	6

PRINCIPAL IMPORTS: Sugar (primarily unrefined), textiles, ferrous metal products, edible oils, automobiles, chemicals and fertilizers, wood, tea, wheat, and pharmaceuticals.

PRINCIPAL EXPORTS: Iron and phosphate ores, fresh citrus, fresh vegetables, canned fish, wine, and dried vegetables.

PRINCIPAL TRADING PARTNERS: Imports, 1963, in percent: Common Market, 57.9; Sino-Soviet bloc, 13.4; United States, 10; United Kingdom, 3.2; Spain, 1.5; and all others, 14. Exports, 1963, in percent: Common Market, 60.6; Sino-Soviet bloc, 10.6; United States, 1.5; United Kingdom, 5.1; Spain, 5.8; and all others, 16.4.

AREA: 172,000 square miles, or slightly larger than California.

POPULATION: 13,103,000 of which 12,800,000 are Moroccans and 303,000 foreigners. 76 persons per square mile.

POPULATION GROWTH: 3 percent per year.

PRINCIPAL CITIES: Casablanca, economic capital and principal port, 1,148,000; Marrakech, 258,000; Rabat, political capital and seat of government, 274,300; and Fès, 237,600.

GROSS NATIONAL PRODUCT: $2.1 billion in 1963, estimated.

ECONOMY: In gross national product—GNP, agriculture accounts for 30%. Seventeen percent of agricultural output produced by 0.7% of the farmers. Main crops: cereals, citrus, grapes, fresh vegetables.

Minerals extractions represent 7% of GNP. Sixty-four percent of value of minerals produced by the state phosphate monopoly.

Industry accounts for 14% of GNP.

PER CAPITA INCOME: $162.

CURRENCY: Dirham equivalent to $0.1976 at official exchange rate.

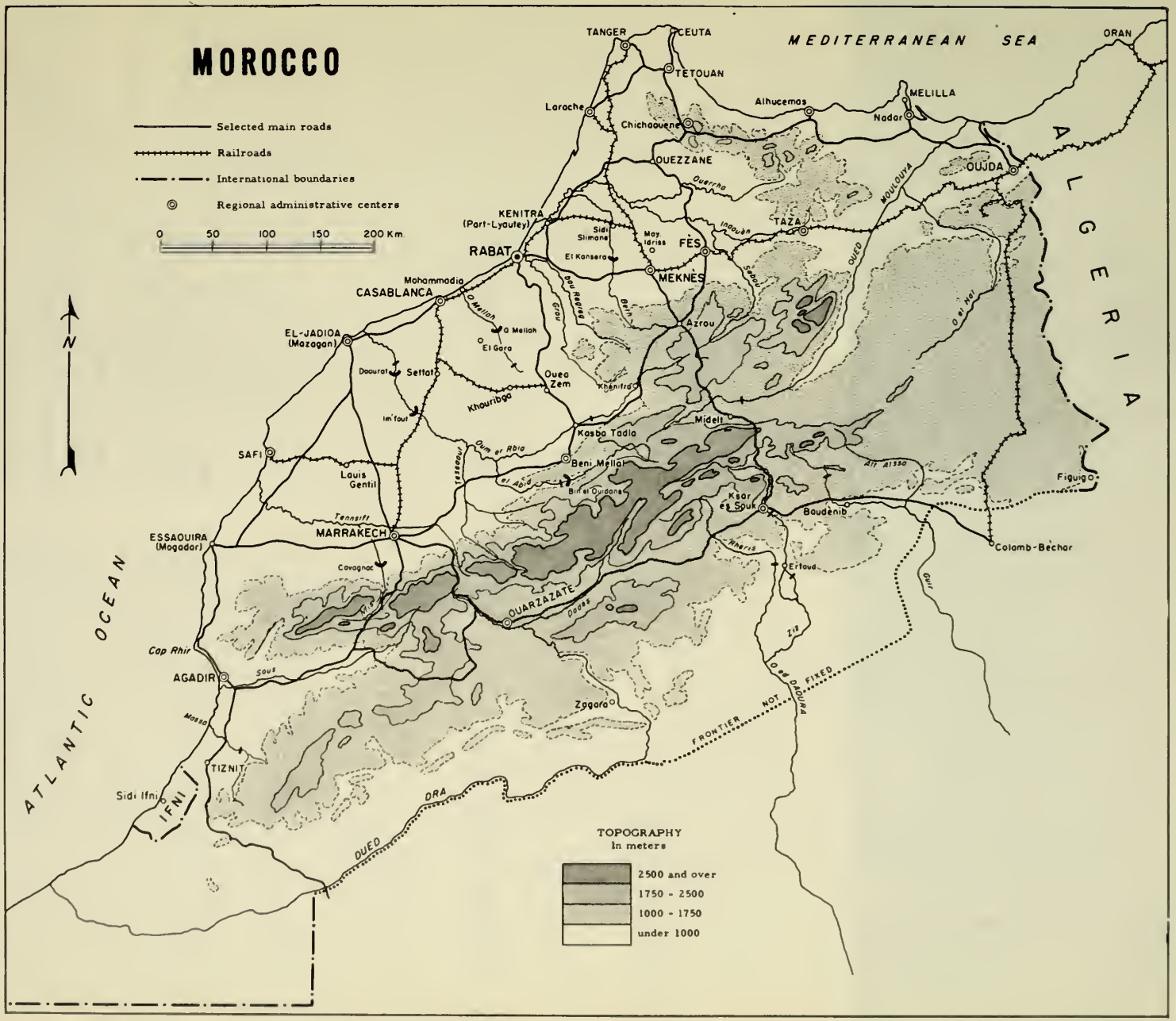
MOTOR VEHICLES: 221,692 of which 150,452 passenger cars and 56,998 trucks and buses.

RADIOS AND TVs: 900,000 radios and 14,000 television sets. Broadcasting is a Government monopoly.

TELEPHONES: 119,620, or 0.9 per hundred population. Nine cities linked to Casablanca by subscriber direct distant dialing.

ELECTRICITY: 83 kilowatt-hours consumed per capita. With a few minor exceptions, characteristics are: 110/220 volts, 220/380 volts, 50 cycles.

COMMUNICATIONS: 7,145 miles of paved primary and secondary roads; 1,192 miles of railways; 429 miles of electrified railways. Primary international airports at Casablanca and Rabat.


MOROCCO
Selected main roads
Railroads
International boundaries
Regional administrative centers
0 50 100 150 200 Km.
N
MEDITERRANEAN SEA
ATLANTIC OCEAN
ALGERIA
TANGER
CEUTA
TETOUAN
Larache
Alhucemas
MELILLA
Nador
ORAN
Chichaouene
OUEZZANE
OUJDA
KENITRA
(Port-Lyautey)
RABAT
Sidi Slimane
Moy. Idriss
FÈS
TAZA
El Kansera
MEKNÈS
Mohammadia
CASABLANCA
Azrou
EL-JADIDA
(Mazagan)
El Gara
Oued Zem
Khouribga
Settat
Daourat
Im'fout
Khénifra
Midelt
Kasba Tadla
SAFI
Beni Mellal
Louis Gentil
Bin el Ouidane
Ksar es Souk
Baudenib
Figuig
ESSAOUIRA
(Mogador)
MARRAKECH
Tennsift
Cavagnac
Erfoud
Colomb-Bechar
OUARZAZATE
Cap Rhir
AGADIR
Sous
Zagora
Massa
TIZNIT
Sidi Ifni
IFNI
DRA
OUED
FRONTIER NOT FIXED
TOPOGRAPHY
In meters
2500 and over
1750 - 2500
1000 - 1750
under 1000

CHAPTER I

Character of the Moroccan Market

The Moroccan gross national product in 1963 was $2,125 million, an increase of $444 million since 1952.

The most important single sector of the economy —agriculture—accounts for 30% of national income. Industry accounts for 14% and mining, 7%. The remaining 49% is generated by public services, commerce, construction, and public works.

The per capita income is $162 per year. However, this figure does not present a clear picture of existing purchasing power because urban workers receive about $600 whereas rural laborers get some $180. In addition, farm workers are regularly paid in kind. Only urban wage earners are fully in the money economy.

In rural areas, 38% are estimated to be underemployed and 15% to be unemployed. In the urban areas, however, only 15% are estimated to be underemployed but 20% unemployed.

Table 1 shows the GNP, GDP, and per capita income for selected years.

The data in table 1 and all the other tables with 1956 figures deal only with the former Southern Zone. The former Southern Zone consisted of the French protectorate known as French Morocco.

← KOUTUBIA MINARET, MARRAKECH: Minaret and trees are outlined against snow in winter on the distant mountains.

The data in table 1 and all the other tables with dollar figures for 1956 and for 1960-63 are based on the following conversion: 1956, $1 equals 350 Moroccan francs; 1960-63, $1 equals 5.01 dirhams.

IMPORTANCE OF MARKET

Morocco's $389 million in exports in 1963 were composed chiefly of mineral and agricultural products. Lacking a significant industrial complex, Morocco imports most of its finished and semifinished goods. In 1963, more than half of Morocco's $448.7 million of imports consisted of manufactured goods.

Prior to independence in 1956, more than half of Morocco's trade was done with France and the French Community. As internal demand increased in the post-independence period, the Government redoubled its efforts to expand exports and in doing so, has exerted considerable effort to diversify both sources of supply and sale of Moroccan goods.

Significant changes have occurred in Morocco's foreign trade between 1956 and 1960-63. See table 2.

Although France and the other members of the European Economic Community—EEC [1] dominate Moroccan trade, their position, especially as a market for Morocco's exports, was not so strong in 1963 as in 1956. From the statistics shown in table 2, it would appear that exports previously going to Europe are being diverted to the Sino-Soviet bloc.[2] As a result of the significant increases in trading activity since 1956, the bloc countries have become Morocco's second most important trading partner.

These changes are perhaps even more significant in relation to future trends when considered by marketing areas. See table 3.

During the first quarter of 1964, Morocco's trade balance swung from a deficit of $9.3 million during the first quarter of 1963 to a trade surplus of $1.2 million. The most notable shift in trade balance occurred with the Common Market countries, with which Morocco had a $9.8 million trade deficit during the first quarter of 1963 and a trade surplus of $9.3 million in 1964.

The trade balance for 1956 and for 1960-63 is reported in table 4.

Morocco's balance-of-payments position continues to show a deficit as indicated in table 5.

On the strength of gains realized through Government operations, the Moroccan balance of payments showed a notable improvement in 1962. However, the unofficial figures for 1963 reveal a deterioration of Morocco's payments situation, and the deficit approaches that for 1961. The negative movement occurred in spite of a noticeable improvement in the goods and services account and is at least partially attributable to a net outflow of private capital.

COMPOSITION OF MARKET

The product composition of Moroccan imports in 1963 is noted in chart 1. The percentage change that has occurred in each of the major commodity groups between 1956 and 1963 is given in table 6. A marked change has taken place.

Imports of foodstuffs vary considerably from year to year and are dependent upon the domestic harvest, particularly that of cereals. Food exports, however, fluctuate with world demand, which in recent years has led to increased sales of citrus fruit, fresh vegetables, and fish.

The development of Morocco's refining plants has alleviated the need for importation of energy and petroleum products. Consumption of petroleum fuels,

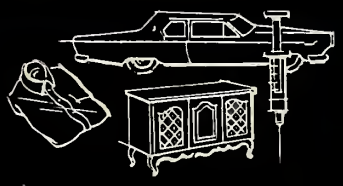
[1] The EEC consists of France, West Germany, Italy, Netherlands, Belgium, and Luxembourg.

[2] The Sino-Soviet bloc consists of the U.S.S.R., Communist China, Soviet Zone of Germany, Czechoslovakia, Yugoslavia, Hungary, Rumania, Bulgaria, and Cuba.

MOROCCO

BUYS FROM ABROAD

Value in Millions of Dollars

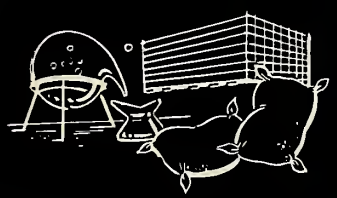


CONSUMER GOODS

$119.6

FOOD

$93.0



SEMIFINISHED PRODUCTS

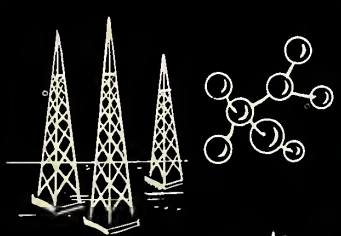
$91.3

INDUSTRIAL EQUIPMENT

$68.6

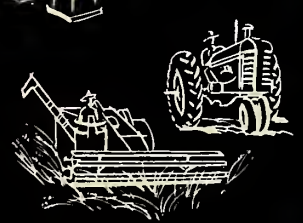
ANIMAL AND VEGETABLE

$49.8



ENERGY

$16.1



FARM EQUIPMENT

$5.5

MINERALS

$4.8

Source:
Central Statistical Service,
Rabat, Morocco

Data are for 1963

other than aviation fuels, totaled $6.4 million in 1963. All of the $6.4 million worth was domestically refined, largely from imported crudes.

The growth of the phosphate trade has more than compensated for the decline of sales in other mineral products.

Increased imports of semifinished products indicate the country's development in chemicals, fertilizers, textile yarns, and semifinished metal products. Progress toward industrialization is aptly reflected by higher purchases of industrial and agricultural machinery, which were $9.8 million higher in 1963 than in 1956. Domestic industry is supplying an increasing share of Morocco's consumer goods requirement. This fact combined with high import duties have caused a steady decline in imports of these products.

TRENDS IN FOREIGN TRADE

Since the end of the Protectorate in 1956, the Moroccan Government has made strenuous efforts to diversify its trade. Although these efforts have met with some success, they have been unable to effect a significant change in trading partners who continue to remain in Western Europe. At the same time, the development of the Common Market has begun to have a growing effect on Moroccan exports, which is demonstrated by the manner in which special trade preferences granted by France to Moroccan products are being phased out. As a result, Morocco is facing growing difficulties in selling its traditional exports.

Late in 1963, Morocco announced its intention of seeking from the Common Market an arrangement that would protect its traditional markets in the member countries and even permit their expansion. At the opening of exploratory talks in Brussels, Belgium, in January 1964, the Moroccan Foreign Minister expressed hope for an agreement that might eventually develop into a free trade area covering the Common Market and Morocco. No agreement has yet been announced.

In its effort to expand trade, Morocco has concluded bilateral trading agreements with a number of countries. Most of these agreements are made with African, Asian, and Communist countries. They usually provide quotas for a certain level of trade in each direction for various products. While these quotas in many cases are little more than pious hopes, Morocco's trade with non-European countries has increased substantially. It seems certain that Morocco will continue to attach considerable importance to the conclusion of trade agreements with as many countries as possible. While this program may not have a radical effect on trading patterns in general, it may shut out some American products. For example, items that can be procured through trade agreement quotas are not included in the general import program. Many imports from the United States enter under that program.

In addition, Morocco has also concluded a number of payments agreements, notably with Soviet bloc countries and Spain as well as with several African nations. Moroccan experience with these agreements, also designed to break the existing patterns of trade, has been far from happy. In theory, these agreements provide for the settlement of accounts between countries without the use of convertible foreign exchange. In practice, trade is rarely in balance, and one country, in effect, extends credit to another. Morocco has often found itself extending credit. As a result, the use of payments agreements is expected to decline.

U. S. SHARE OF MARKET

The United States share of the Moroccan market increased from 8.8% in 1956 to 13.5% in 1962 and then declined to 10% in 1963. See table 7. This 1956-63 expansion represents a 14.3-percent increase in American products sold in Morocco, amounting to $5.6 million. These sales increases centered in agricultural products, which increased by $16.9 million and now comprise more than 50 percent of the U. S. products sold to Morocco. Farm product demand in 1963 was attributable in a large measure to the 1962 drought, which necessitated large imports of grain, and was met primarily by U. S. Government shipments of surplus commodities under Public Law 480 and U. S. Aid Supporting Assistance.

Moroccan demand for nonagricultural products from the United States declined 33% from that in 1956, or $11.3 million.

Morocco's imports from the United States in 1956 and 1960-63 are given in table 8. That table also shows U. S. share, in percent, of total sales to Morocco of each of the items.

Most notable variations in imports of agricultural products from the United States have occurred in hard wheat (plus $2.9 million), wheat flour (plus $3.8 million), tobacco (plus $ .6 million), miscellaneous foodstuffs (—$3.5 million), which include processed foods of various kinds as well as cereals other than wheat, and in addition miscellaneous animal and vegetable origin products, which include unrefined edible oils

MOROCCO

SELLS ABROAD

Value in Millions of Dollars

FOOD

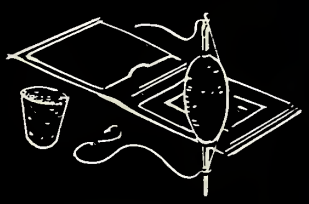
$188.7

MINERALS

$133.5

ANIMAL AND VEGETABLE

$35.9



SEMIFINISHED GOODS

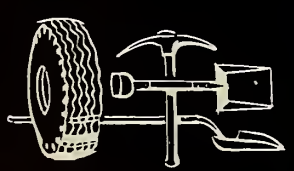
$15.4

CONSUMER GOODS

$10.3

ENERGY

$3



INDUSTRIAL EQUIPMENT

$1.8

Source:
Central Statistical Service,
Rabat, Morocco

Data are for 1963

and raw cotton (plus $10.6 million). The particularly high imports of cereals in 1961 and 1962 were due to severe drought and the inception of the National Promotion scheme. That scheme is one by which many of Morocco's unemployed are put to work on projects in the national interest. They are paid with food allotments. All told, imports of wheat from the United States may level off to 125,000 to 150,000 tons per year.

Major increases in imports of nonagricultural products were achieved in paraffine, miscellaneous minerals, chemicals, raw paper products, ferrous tubes, pipes, castings and accessories, nonhousehold hardware, miscellaneous semifinished products (plus $1.9 million), machine tools, food-processing machinery, nonagricultural tractors (plus $0.7 million), miscellaneous industrial equipment, and cotton fabrics (plus $1.6 million).

Decreases in imports of nonagricultural products have occurred principally in coal, gasoline, lubricants, natural sulfur, raw copper, agricultural machinery (minus $1.0 million), solid and pneumatic industrial tires, machinery spare parts (—$0.5 million), piston engines (—$0.9 million), crushing machinery, textile machinery, and industrial vehicles (—$3.2 million) spare parts for these vehicles (—$0.9 million), medicines and drugs, synthetic and artificial fiber fabrics (—$1.0 million), wearing apparel, shoes, household refrigerators (—$0.9 million), automobiles and spare parts (—$1.5 million) and miscellaneous consumer products (—$1.5 million).

Individual product decreases as well as the overall decrease of $11.3 million in imports from the United States of nonagricultural products do not necessarily imply that American brand items in this market have declined to this extent. This is so because many American firms have, since 1956, established manufacturing facilities in Europe and the United Kingdom and are supplying this market from those plants with goods essentially identical to U. S. manufactures and in certain instances better adapted to this market's requirements.

***INSIDE CASABLANCA HARBOR:** View north-northwest across western part of the port with a storage area at center.*

CHAPTER II

Market for Selected Commodities

SPECIFIC PRODUCTS or groups of products that appear to possess a potential for the American exporter have been selected for analysis. This selection does not form a complete list of all American products that may be sold in this market. The selection is based on (1) the suitability of the American product to the market's requirements and (2) on the current and foreseeable future policy of the Moroccan Government on the granting of import licenses to an American product.

There is little doubt that many American brands manufactured in Europe more clearly respond, in certain cases, to the market's requirements than do those manufactured in the United States. The European products can, in general, be imported with greater ease than the American owing to Morocco's trade and payments agreements with European countries. This survey is concerned, however, only with the market potential for goods of U. S. origin.

Few consumer items will be discussed because the Moroccan Government usually will not make dollar foreign exchange available for their importation from the United States. On the other hand, dollar foreign exchange for industrial and capital goods, industrial supplies and materials is, generally, readily available. The most notable exception are those goods, regardless of source, whose importation is either forbidden or limited in order to protect local industry. For a thorough explanation of Moroccan trade restrictions, see Chapter VII, Import Regulations.

In the tabulations that appear in the sections on individual commodities, imports from the United States during 1963 are shown together with the three (where there are that many) leading foreign suppliers. When the United States ranks among the first three suppliers, it is so shown. However, when the United States is shown last, it is not necessarily the fourth most important supplier. The tables also show value of imports by product by country by year.

AGRICULTURAL PRODUCTS

Agricultural imports include hard wheat, soybeans and soybean oil, edible/inedible tallow, leaf tobacco, and raw cotton. See table 9.

The value of these imports in 1963 by originating country was, in millions of dollars:

Hard wheat, total	7.3	Leaf tobacco, total	2.6
United States	3.7	Brazil	.9
France	3.6	Dominican Republic	.4
Soybeans, total	.3	United States	.3
United States	.3	Cuba	.3
Soybean oil, unrefined	7.7	Raw cotton, total	2.3
United States	7.7	United States	1.2
Tallow, edible and inedible	1.7	Chad	.5
United States	1.3	Mexico	.3
France	.3	Guatemala	.1
Finland	(1)		
Yugoslavia	(1)		

[1] Less than $50,000.

Wheat is presently imported under Titles I and II of Public Law 480. It is estimated that there will be a continuing market for 125,000 to 150,000 tons per year. This market could possibly increase by 1970 if the population continues to grow at its present rate and if demand rises faster than Morocco's own production.

The market for soybeans will probably continue in spite of Morocco's increased production of both cottonseeds and sunflower seeds. The prime market, however, will be for unrefined, degummed soybean oil. In any event, total consumption of refined edible oils is growing and will continue to grow as the population expands and purchasing power increases.

The market for inedible tallow bears a direct relation to the market for soap, which surprisingly enough has been able to hold its own in recent years.

Consumption of washing products has risen since 1956; almost all that increase has come in the consumption of detergents. While the market for laundry washing products will increase in the future, laundry soap sales may decrease. Because sales of toilet soap will probably increase as purchasing power goes up, requirements for tallow will probably maintain their current levels.

Tobacco product manufacture and sale in Morocco are a monopoly of the Regie Autonome des Tabacs, a private firm under the control of the state. The Regie des Tabac charter expires in 1967, and the firm will probably be nationalized at that time.

***POWER FARM EQUIPMENT:** Men harvest mature grain in a wide, bountiful Moroccan prairie under a fair sky.*

Although American blends are gaining in popularity, the majority of cigarette production is of French-type and intended for the low-priced market. In 1956, 3.2 billion cigarettes were made and in 1963, 4 billion. Cigarette sales, including production, increased by 3.7 billion from 1956 to 1963.

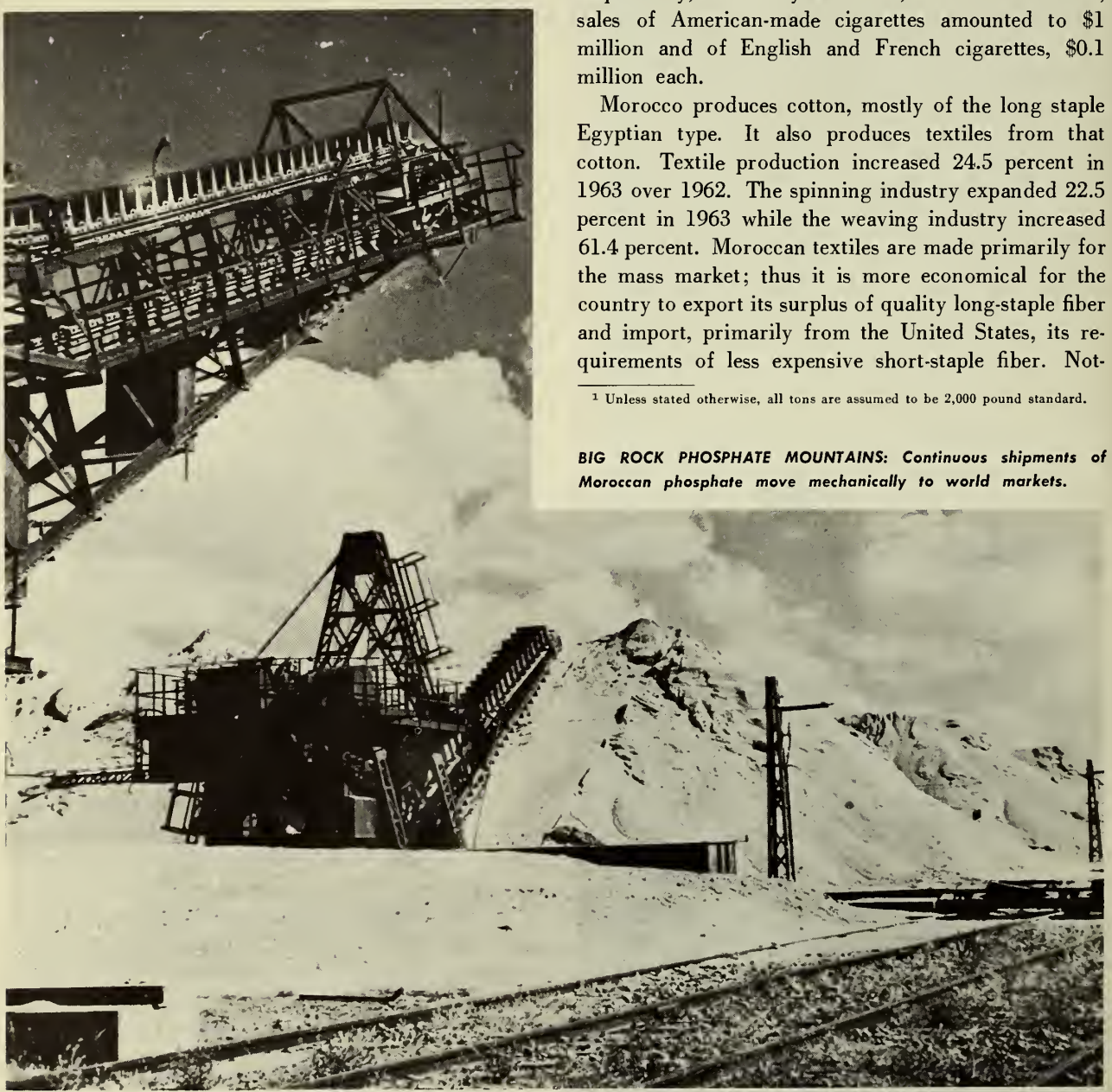
Consumption has increased faster than production, a trend that is expected to continue.

In order to supply more of its needs from domestic sources, Morocco is trying to grow more leaf tobacco but may fail in that effort unless blue mold, a disease of tobacco, is controlled. In 1963, for example, blue mold was primarily responsible for the loss of all but 500 metric tons [1] out of an expected crop of 2,000 metric tons.

Tobacco imports will probably remain at today's level although they could rise noticeably with crop failure. Practically all leaf tobacco, both imported and domestic, is ued for cigarette manufacture. The Regie is, however, increasing its emphasis on the manufacture of American-type blends, which may stimulate sales of American leaf tobacco to the detriment of sales of American-made cigarettes. Cigarette imports were worth, in millions of dollars: 1.6, 1.5, 1.2, 0.9, and 1.2, respectively, for the years 1956, 1960-63. In 1963, sales of American-made cigarettes amounted to $1 million and of English and French cigarettes, $0.1 million each.

Morocco produces cotton, mostly of the long staple Egyptian type. It also produces textiles from that cotton. Textile production increased 24.5 percent in 1963 over 1962. The spinning industry expanded 22.5 percent in 1963 while the weaving industry increased 61.4 percent. Moroccan textiles are made primarily for the mass market; thus it is more economical for the country to export its surplus of quality long-staple fiber and import, primarily from the United States, its requirements of less expensive short-staple fiber. Not-

[1] Unless stated otherwise, all tons are assumed to be 2,000 pound standard.



***BIG ROCK PHOSPHATE MOUNTAINS:** Continuous shipments of Moroccan phosphate move mechanically to world markets.*

withstanding Morocco's cotton production increase from an estimated 41,700 bales of 500 pounds each in 1962 to an estimated 71,900 bales in 1963, imports of raw cotton should continue at present or higher levels.

CHEMICALS AND DRUGS

Imports of inorganic chemicals, made up notably of sulfur and sodium compounds, have remained practically constant since 1956 while imports of organic chemicals, primarily composed of acyclic polyamines and nitrogenous urea, have increased from just over $16,000 to over $800,000. See table 10.

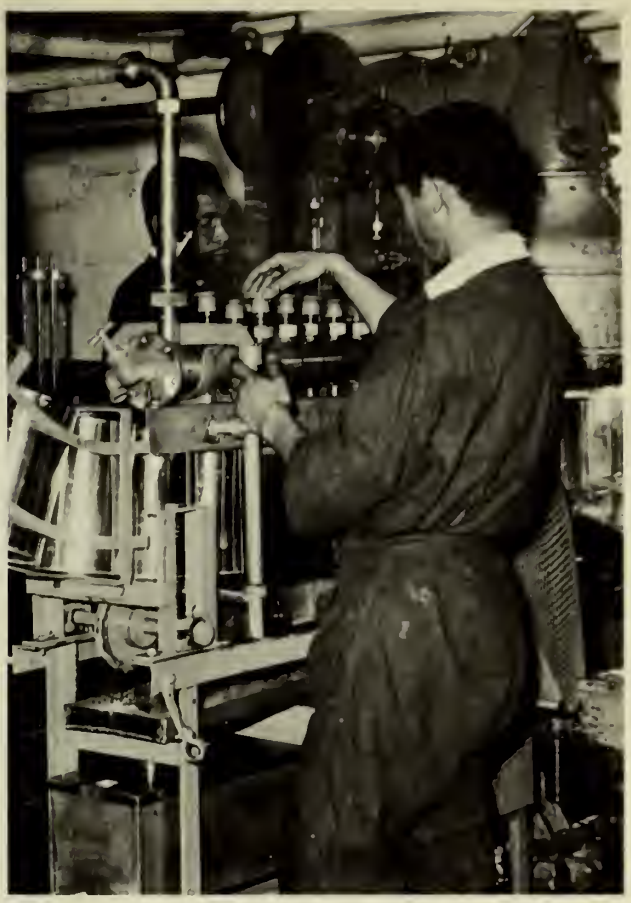
Imports of insecticides, fungicides, disinfectants, and the like have increased significantly. There is little question but that this market will continue to expand. The Moroccan Government, through the Office National des Irrigations in particular, is making an effort to convince the Moroccan farmer of the advantage to him in the use of these chemicals. Although some of the Moroccan farmers know that these chemicals can improve crops, the traditional farmers among them have yet to learn. Education of the farmer in the use of chemicals will broaden the market. American manufacturers will do well to seek aggressive, local representation for their chemical products.

The value of these imports in 1963 by country of origin was, in millions of dollars:

Principal organic chemicals	.8
France	.7
West Germany	.1
Netherlands	(1)
United States	(1)
Principal inorganic chemicals	3.1
France	1.8
West Germany	.4
Yugoslavia	.2
United States	(1)
Bulk disinfectants, insecticides, fungicides	2.7
France	1.3
West Germany	.5
Netherlands	.4
United States	.2
Principal fertilizers	4.6
France	2.5
West Germany	1.1
Italy	.6
United States	(1)
Dyes	1.3
West Germany	.4
France	.3
United Kingdom	.2
United States	(1)
Miscellaneous chemicals	.6
France	.3
West Germany	.2
United States	.1
United Kingdom	(1)

[1] Less than $50,000.

As in the case of insecticides, imports of fertilizers—nitrogenous, potassic, and phosphatic—have increased almost 175% since 1956. The problem of education in their use is similar to that for insecticides. The market aspect is, however, less favorable. The position of U.S. manufacturers is weak in relation to those in the Common Market. With Morocco's vast reserves of phosphates, current local fertilizer production, and the planned chemical complex at Safi, domestic production should increase to satisfy Morocco's needs. Nevertheless, there should undoubtedly be room for certain specialized formulations, particularly, nonphosphatic varieties. At present, Morocco's international sales of phosphatic fertilizers are decreasing while sales of nitrogenous fertilizers are increasing.



***CANNED FOOD**: For canning fruits and vegetables, Morocco needs machines, equipment, cans, and can lids.*

The dye market, too, has increased notably since 1956. Most of these imports consist of organic dyes, though imports of synthetic and inorganic dyes for the tanning industry are also of importance. Morocco's expanding textile industry, which has received a $29 million investment since 1959 and has increased production by 83%, will remain an important consumer of such dyes. In 1963, U.S. suppliers sold only $1,000 worth of dyes to Morocco.

Though production of drugs in Morocco has increased, imports have also risen. The total value of

selected packaged patent and prescription drugs imported was, in millions of dollars:

1956	7.0	1963	11.2
1960	8.6	France	9.7
1961	10.1	West Germany	.4
1962	11.2	Spain	.2
		United States	(1)

[1] Less than $50,000.

Drug and pharmaceutical consumption will reach an estimated value of $18 million in 1964. Through education, increased purchasing power, and improved public health services, health conditions in Morocco are steadily improving and will undoubtedly continue to improve. Along with that improvement, the consumption of pharmaceuticals and drugs, both private and Government, may increase. Though imports from the United States amounted to only $21,000 in 1963, sales of American brands, notably from European subsidiaries, were unquestionably higher.

For those products destined for the retail consumer, the American supplier faces certain obstacles. Exterior and interior instructions on packages must be written in French and Arabic. Doctors, generally French trained, are more familiar with French products than with those of other countries. Drugs must generally meet French pharmacopoeia criteria.

For those products purchased by the Government, only the requirement on the French pharmacopoeia must be met. The Government buys in bulk. Its purchases will increase over the years as public health facilities expand. Its requirements are met through public tenders, and local representation is a necessity. U.S. manufacturers can materially increase their sales of drug products to Morocco.

EQUIPMENT AND MACHINERY

Industries using packaging, filling, cleaning, materials handling, and conveying equipment have in many instances increased production.

Indicative of current requirement for packaging, handling, and conveying equipment is the production of phosphate fertilizer. Production was 9.4 million tons in 1963, an increase of 426,000 tons over that in 1962. Production is expected to reach an annual rate of approximately 13.2 million tons during the early part of 1966. The increase in production in 1963 over 1962 of anthracite amounted to 37,700 tons. Cement production increased 67,990 tons. The food processing industry as a whole increased its output by an estimated 7.1 percent in 1963. Citrus exports in the 1963-64 season are estimated at 535,000 tons as compared to only 193,000 tons in the 1955-56 season. During the same period—1955-56 to 1963-64—the canned fish industry increased its output by over 1 million cases. The 1962-63 production amounted to 2.5 million cases. While this industry is presently over equipped, competition from other producing countries might well force modernization of its plant facilities.

Canned vegetable production has almost tripled since 1956, canned fruit production is up over 50%, and the citrus juice industry's production has jumped from 1,800 tons in 1956 to 8,300 tons in 1963. Planned projects include a new 22,000 ton citrus juice factory, a tomato paste plant of 13,000 tons capacity, and up to 7 sugar beet refineries to be built over the next 10 years. Each of the refineries is to have a capacity of over 30,000 tons of refined sugar per year. Fresh citrus and vegetable production will most probably increase in the future.

Total imports in the handling and packaging line amounted to $1.7 million in 1963; the United States supplied only $91,600, or just over 5%, of that amount.

Imports by years are reported in table 11. Value of these imports, in 1963 by country of origin, in millions of dollars:

Packaging, filling, and cleaning equipment	0.7	Materials handling equipment	.5
France	.4	France	.2
West Germany	.1	United Kingdom	.1
Switzerland	(1)	United States	.1
United States	(1)	Netherlands	(1)
		Conveying equipment	.5
		France	.3
		United Kingdom	.1
		Switzerland	(1)
		United States	(1)

[1] Less than $50,000.

Owing to depressed world prices for many ores, much of Morocco's mining activity has declined. The most notable exceptions are phosphate mining and petroleum exploration, both of which have expanded. Five companies are prospecting for petroleum, one has been producing on a limited basis for some years. Its 1963 production was 165,000 tons.

Imports of mining and drilling equipment, by years, were, in millions of dollars:

1956	1.3	1963	.6
1960	2.0	United States	.3
1961	1.1	France	.2
1962	.4	West Germany	(1)
		Italy	(1)

[1] Less than $50,000.

MACHINE-MADE MOUNDS: Moroccan farmers use machines to till the earth, plant seeds, and harvest the crops.

To increase cereal production and educate the Moroccan farmer in modern techniques, governmental agencies, such as Office National des Irrigations as well as the Office National de la Modernisation Rurale, purchase modern farming machinery and equipment that is then made available to the farmers on a cooperative basis. These agencies have thus become primary purchasers of farm machinery.

Non-Moroccan farmers, on the other hand, hesitate to renew and expand present equipment on account of the repossession by the Moroccan Government of colonial lands.

Imports of grain combine-harvesters, by years, were, in millions of dollars:

1956	1.1
1960	(1)
1961	.1
1962	.5
1963	1.0
West Germany	0.4
France	.3
United States	.2
United Kingdom	.1

[1] Less than $50.000.

Automotive gasoline engine imports in 1963 included not only replacement engines but also those required for the assembly of Willys Jeeps. Landrovers, and Simca and Fiat automobiles. See table 12. Automotive diesel engine imports include replacement engines, conversion engines, and those for mounting in locally assembled Volvo, Thames Trader, and Berliet trucks. The automotive diesel market, by and large, attaches more importance to initial purchase price than to long-term costs. Many Moroccan businessmen do not make a cost per mile comparison of purchase cost plus maintenance and repair over a long period. Many of

them assume, therefore, that a motor of lower initial price is still the least expensive in the long run. Many non-Moroccans, hesitant to make long-term investments, prefer lower initial price engines which, though perhaps more costly in the long run, can be amortized over a shorter period.

Stationary and marine gasoline engine imports include, among others, the small one-cylinder engine used in the United States in garden tractors and power lawnmowers. They are used in Morocco, however, with small electrical generating sets and small water pumps. Since diesel fuel presently costs 40% less than gasoline, purchasers will continue to prefer diesel to gasoline engines.

The value of engine imports by country of origin in 1963, was, in millions of dollars:

Automotive gasoline engines	1.0	Stationary and marine gasoline engines	.1
France	.5	France	(1)
West Germany	.2	United States	(1)
United States	.1	West Germany	(1)
United Kingdom	.1	Sweden	(1)
Automotive diesel engines	3.4	Stationary and marine diesel engines	1.0
Sweden	1.2	United Kingdom	.3
United Kingdom	1.1	West Germany	.3
France	1.0	United States	.2
United States	(1)	Czechoslovakia	.1

[1] Less than $50,000.

Stationary and marine diesel engine imports have more or less held their own during 1960-63. In Morocco, the British suppliers lead, especially in the sale of stationary diesels whereas American suppliers lead in the sale of marine diesels.

In the field of electrical power generation, facilities will be largely hydraulic and thermal. Several suppliers are attempting to introduce into the market jet-powered standby and peak power generating sets. Diesel power for irrigation is encountering, in certain areas, serious competition from electric power. In the Sous Valley, new private pumping facilities for irrigation will most probably be electrified. However, many irrigation projects undertaken by Office National des Irrigations may well require considerable diesel power. Morocco's fishing fleet could expand if the domestic tuna industry proves to be economic.

The Moroccan Government's emphasis on agriculture in its development planning will increase the need for pumps of all types for irrigation. One of the largest purchasers will be the Office National des Irrigations, which will control, either directly or indirectly, the land irrigation projects.

Price is of major importance. Even though long run costs may be higher with less expensive pumps, the governing factor will be the initial purchase price. Purchasers of specialized pumps for use in handling petroleum products and chemicals are generally less concerned with purchase price than with long range costs. The Safi chemical complex should offer a market for American suppliers of pumps.

The value of pump imports by country of origin was, in 1963, in millions of dollars:

Pumps, liquid	.6	including air compressors	.5
France	.4	France	.2
West Germany	.1	United Kingdom	.1
United States	.1	Italy	(1)
Italy	(1)	United States	(1)
Pumps (gas, air, vacuum)			

[1] Less than $50,000.

Imports of pumps, by years, were, in millions of dollars:

	1956	*1960*	*1961*	*1962*	*1963*
Pumps, liquid	0.3	0.6	0.9	0.6	0.6
Pumps, gas, air, vacuum, including air compressors	14	.6	.5	.5	.5

Imports of air conditioning equipment, both window type and central units, were worth $100,000 in 1960 but increased to $400,000 in 1963.

Imports of air-conditioning equipment, by years, were worth, in millions of dollars:

1956	0.1	1963	.4
1960	.1	United States	.2
1961	.2	France	.1
1962	.2	United Kingdom	(1)

[1] Less than $50,000.

There has been a very definite increase in the use of central systems, especially in public buildings and major new luxury-type hotels. Perhaps the most spectacular increases have occurred in the last year or so in the sale of window-type units. Many hotels, a few offices, and a few private residences have installed or are installing individual units. In addition, the estimated 10,000 rooms to be built within the next four or five years as tourist accommodations should stimulate sales.

The consumer market is presently giving preference to reverse-cycle heat pump units, which provide not only summer cooling but relatively economic winter heating. Compressor-type units with heating elements are far more costly to operate in winter in a country where electricity, though plentiful, is not cheap. Units of 1 horsepower or more should be built to operate on 220-volt, 50-cycle, single-phase current.

In addition, demand for both humidifiers and dehumidifiers has increased. Morocco's coastal areas are rather warm and quite humid in summer, whereas the interior is very hot and very dry. These units are used in private homes and also in stores, certain plant areas, and storage areas.

The annual imports of textile machinery and accessories increased by $3.6 million from 1956 to 1963.

Textile industry investments approved by the Moroccan Government amounted in 1963 alone to $8 million for plant and equipment. Textile production increased by 83% from 1958 to 1963. Cotton weaving mills increased their actual production in 1963 by an estimated 61.4%, woolen weaving mills by 35.6%, rayon mills by 61.1%, cotton spinning mills by 22.5%, and woolen spinning mills by 14.6%.

The market for textile machinery has by no means reached saturation; in fact it will continue to expand as Morocco develops. As utilization of locally produced textiles increases, demand for textile machinery will become stronger. Machines from the Soviet bloc has been used but results have been disappointing. Mill owners are beginning to realize that economies effected at the time of purchase can be rapidly wasted by downtime and higher maintenance and repair costs.

American manufactures will encounter stern competition from modern equipment from Europe, and the supplier who has a spare parts depot close at hand will have a considerable edge over one who lacks a depot. American companies should attempt to offer a complete line of equipment. Then, the local mill owner need have but one major machinery supplier, though the supplier may in effect only manufacture a portion of the equipment. The Moroccan Government thus far

***MINING AND HAULING**: An American-made dragline loads a dump truck at a Moroccan open-pit phosphate rock mine.*

has opposed granting imports licenses for other than new equipment.

In the garment industry, industrial sewing machine imports increased by $189,000 from 1956 to 1963. The value of selected imports of textile machinery and accessories and of industrial sewing machines, by year, was, in millions of dollars:

	1956	*1960*	*1961*	*1962*	*1963*
Textile machinery and accessories, total	0.6	1.1	2.6	3.0	4.3
Industrial sewing machines, total	.2	.2	.2	.2	.4

The principal suppliers in 1963 of textile machinery and accessories were, in millions of dollars: France, 1.6; West Germany, 0.9; and Italy, 0.8. The United States then supplied less than $50,000 worth. The principal suppliers in 1963 of industrial sewing machines were, in millions of dollars: West Germany, 0.2; United States, 0.1; and Italy, 0.1. The United Kingdom supplied less than $50,000 worth.

The industry, as a whole, should expand significantly. For example, in 1963, uniforms needed by the Moroccan Government had a landed value of $4 million and were made outside of Morocco owing to the local garment industry's insufficiency. Needless to say, situations of this nature will be corrected and for this purpose additional facilities, including industrial sewing machines, will be required.

Imports of metalworking machine tools, which have increased by $1.0 million between 1956 and 1963, will continue at a relatively high level while Morocco pushes ahead with industrialization. Big machine shopowners appreciate high quality tools, but many small shopowners are not easily convinced of the justification for a proportionately higher priced tool. The market has a definite need for moderately priced, easily operated, relatively simple machine tools. Even when high quality is fully appreciated, certain potential buyers cannot afford the better quality, higher priced tool.

The steadily increasing industrial bearing, gear, and power transmission market is one in which the United States is an important supplier. A certain portion of these imports from the United States replace parts of existing machines. The continued sale of these supplies is influenced by Moroccanization which has led to a widening of the basic structure of user industries and a loosening of ties with traditional brands and suppliers. Therefore, U.S. manufacturers need to become more aggressive marketers in this market for these supplies.

The imports of metalworking machine tools, industrial bearings, gears, and power transmission trains have been increasing steadily since 1956. The value of these imports has been, in millions of dollars:

Metalworking machine tools		Industrial bearings, gears, power transmission trains, etc.	
1956	.3	1956	.7
1960	.6	1960	1.5
1961	.9	1961	1.8
1962	1.0	1962	1.9
1963	1.3	1963	2.4
France	.7	France	1.0
Czechoslovakia	.2	United States	.4
Italy	.1	West Germany	.3
United States	(1)	United Kingdom	.3

[1] Less than $50,000.

Both the production and consumption of electricity have increased in Morocco, but the increase in consumption has not equaled that in production. Production and consumption of electricity were:

	1952	*1955*	*1958*	*1963*
Net production—millions of kilowatt-hours	686	887	948	1,087
Consumption per capital—kilowatts	74	87	89	[1] 83

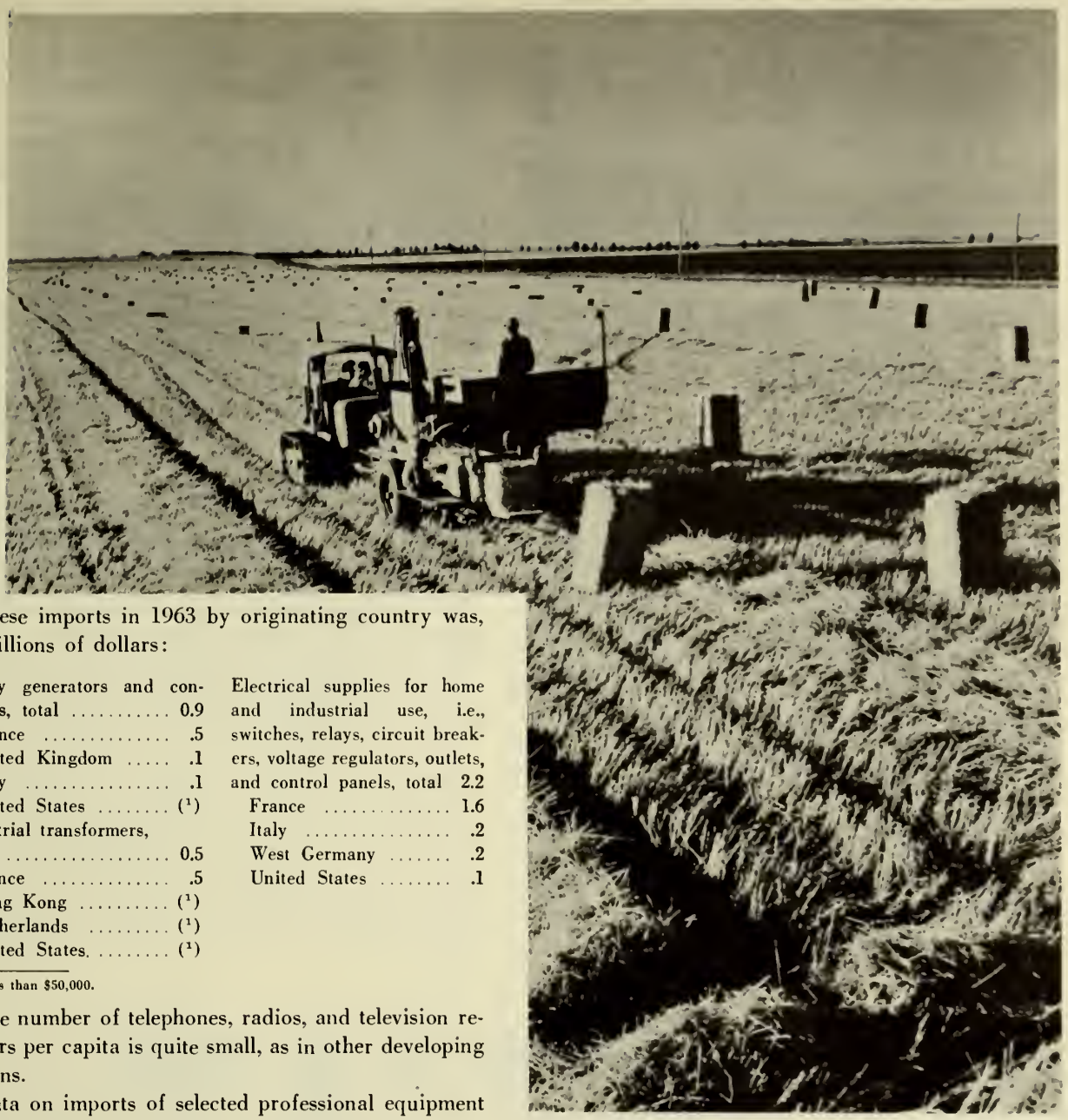
Source: Central Statistical Service, *Tableaux Economiques du Maroc, 1915-1959*, Rabat.

[1] Based on estimated population.

Selected electrical equipment worth over $5 million was imported in 1963. The United States supplied less than $100,000 of that amount. The value of some of these imports is reported in table 13.

American manufacturers interested in penetrating this market must be prepared to supply equipment meeting domestic electrical characteristics. For example, the equipment must be wired for 50-cycle current. In addition, the equipment must be robust, uncomplicated, and simple to operate. It must certainly be built thus—for use by the National Electric Company—the Moroccan state owned utilities company, which, while having excellent engineers, does not always possess enough qualified operators and maintenance personnel to meet requirements throughout the entire country. In many instances the company prefers equipment with low efficiency but upon which simple, even though more frequent, maintenance is possible. Highly complex mechanisms, though highly productive for less money, are in many instances rejected because of difficulties of repair.

Electrical equipment imports include rotary generators and convertors, industrial transformers, and electrical supplies for home and industrial use. The value



of these imports in 1963 by originating country was, in millions of dollars:

Rotary generators and convertors, total	0.9
France	.5
United Kingdom	.1
Italy	.1
United States	(1)
Industrial transformers, total	0.5
France	.5
Hong Kong	(1)
Netherlands	(1)
United States	(1)
Electrical supplies for home and industrial use, i.e., switches, relays, circuit breakers, voltage regulators, outlets, and control panels, total	2.2
France	1.6
Italy	.2
West Germany	.2
United States	.1

[1] Less than $50,000.

The number of telephones, radios, and television receivers per capita is quite small, as in other developing nations.

Data on imports of selected professional equipment are shown in table 14.

The value of these imports by country of origin was, in 1963, in millions of dollars:

Radar and similar equipment	0.1
West Germany	.1
France	(1)
Netherlands	(1)
United States	.3
Receivers and transmitters (not for home entertainment) for radio and television	.5
France	.3
United States	.3
Netherlands	.1
Belgium-Luxemburg	(1)
Radio tubes, receiving and transmitting	.4
France	.2
Netherlands	(1)
United States	(1)
United Kingdom	(1)

[1] Less than $50,000.

***MECHANIZATION:** The level Atlantic coast Moroccan fields are made to order for farming with the aid of machinery.*

The market for radar and similar equipment is small indeed. In fact, the United States did not share that market in 1963. But, American equipment has been and can be sold in Morocco. For example, at the American Pavilion of the 1964 Casablanca International Trade Fair, an American exhibitor, through aggressive merchandising, was able to sell his firm's products and to stimulate a future market for those products.

The Government is currently using coaxial cable

rather than microwave or other type equipment for new telephone installations.

As to television transmission, the French have preempted this field through Government-to-Government agreements favorable to Morocco.

In general, telecommunications equipment for the Armed Forces, National Security Forces, and police provides a limited, though highly receptive market for American suppliers of quality equipment. Local representation is deemed essential, as post-sales parts and service are prime factors in supplier selection. American suppliers having parts depots and French-speaking technical personnel based in Europe would have a real advantage over those who do not.

The tracklaying diesel tractor market increased from practically zero in 1956 to over $1.5 million in 1963. While this field is still dominated by American brands, French makes are appearing. Thus, in 1963, a French firm arranged for some of its tractors to be assembled locally. While the benefits to the Moroccan economy from the local assembly of the tracklaying tractors may be less beneficial than that from purchase abroad of wheeled tractors, preferential treatment may still be given on Government tenders to the locally assembled tracklaying tractors. There is no doubt but that the Government will become, more and more, the prime purchaser of these tractors.

The value of imports of tracklaying tractors in 1956 and 1960-63, was: 1956, less than $50,000; 1960, less than $50,000; 1961, $400,000; 1962, $1.1 million; and 1963, $1.5 million. Imports in 1963 by country were, in millions of dollars: France, $0.6; United States, $0.5; United Kingdom, $0.3; and Canada, $0.1.

Automobiles whose motor cylinder volume is less than 3,000 cubic centimeters (183 cubic inches) are subject to very stringent import quotas. These quotas are imposed by the Moroccan Government in order to protect domestic sale of locally assembled Simca and Fiat cars.

American cars of less than 183 cubic inches cylinder volume do not sell in Morocco but those of 183 cubic inches and above do have market potential. Imports of automobiles of 183 cubic inches capacity and over in 1956 and 1960-63 were, in millions of dollars: 1956, $4.0; 1960, $0.9; 1961, $0.6; 1962, $1.1; and 1963, $2.5. Imports in 1963 by country were, in millions of dollars: United States, $2.2; United Kingdom, $0.1; Belgium-Luxembourg, $0.1; and the Netherlands, $0.1.

While imports of automobiles of under 183 cubic inches motor capacity are restricted, imports of cars above that capacity increase, particularly of American brands. European automobiles of the larger capacity, such as the Mercedes, were excluded by the quota and have been replaced largely, in what is a luxury category in Morocco, by American automobiles. American manufacturers should dominate the luxury market for some years to come.

The United States currently dominates the aircraft spare parts market in Morocco. Imports from the United States in 1963 amounted to $400,000; those from France, $300,000. The total amount of imports was $800,000. Other importers were the United Kingdom and Belgium-Luxembourg.

Imports, by years, were, in millions of dollars: 1956, $0.4; 1960, $0.7; 1961, $0.8; 1962, $0.9; and 1963, $0.8.

The present equipment of Royal Air Maroc—Morocco's national airline—is composed largely of Lockheed 1049 Constellations, Douglas DC-3s, and Caravelle jet aircraft. The Caravelles are equipped exclusively with Rolls-Royce engines. The share of American aircraft in the fleet will probably decrease.

Among nonscheduled users, both Government and private, American-made aircraft have a favorable position. The demand for spares for these planes will probably increase as the sales of new aircraft increase. In addition, the Moroccan Armed Forces have purchased aircraft from the U.S. Government. This purchase provides another source of future spare parts sales.

MISCELLANEOUS PRODUCTS

Imports of steel wire cable, which have approximated $500,000 per year, increased more than threefold in 1963, as follows, in millions of dollars:

1956	0.3	1963	1.7
1960	.5	France	0.8
1961	.5	Belgium-Luxembourg	.5
1962	.5	United Kingdom	.3
		United States	(1)

[1] Less than $50,000.

These imports consisted primarily of braided steel wire cable. Construction projects, such as the chemical complex at Safi, the sugar beet refinery at Sidi Slimane, and the phosphate production expansion, contributed to the large increase in use in 1963.

Though the United States is an exporter to Europe of aluminum and copper, it does not share in this $5 million market in Morocco. See table 15. This is partially attributable to the fact that many American producers ship to Morocco through their European subsidiaries.

The value of these imports by country of origin in 1963 was, in millions of dollars:

Aluminum bars	0.2	Laminated copper bars	2.5
France	.2	France	2.5
Italy	(1)	United States	(1)
West Germany	(1)	Copper sheets	.6
United States	(1)	United Kingdom	.2
Aluminum sheets	2.1	Italy	.1
France	2.1	Yugoslavia	.1
Italy	(1)	United States	
Algeria	(1)		
United States	(1)		

[1] Less than $50,000.

Expansion of the facilities of the Office Cherifien Des Phosphates, construction of the chemical plant at Safi, and initiation of several irrigation projects will create an active demand for welded and seamless pipe. Purchases are made for large projects and price competition is intense; consequently, suppliers must offer attractive f.o.b. and c.i.f. bids. As yet, the U.S. share of equipment in this market is negligible.

The textile and garment industries are among the fastest growing in Morocco today. Though production in the textile industry has increased by 83% since 1958, fabric imports have remained more or less static, indicating a net rise in consumption.

Imports of textiles in 1956 and 1960-63 are noted in table 16.

The value of fabric and yarn imports by country of origin was, in 1963, in millions of dollars:

FABRICS		Woolen	2.5
Coated impregnated	1.2	France	1.6
France	.6	Italy	.6
United States	.3	United Kingdom	.2
Czechoslovakia	.1	United States	(1)
West Germany	(1)	Cotton	11.9
Synthetic knitted piece goods	.7	France	2.6
United States	.3	United States	2.3
France	.3	Spain	1.8
Italy	(1)	Egypt	.9
West Germany	(1)		
Mechanical embroidery piece goods	1.1	**YARNS**	
France	.8	Synthetic fiber	1.4
Switzerland	.3	France	.6
Italy	(1)	Italy	.3
Synthetic fabrics	2.8	Switzerland	.2
France	.4	United States	(1)
United States	.3	Cellulose fiber	3.3
Portugal	.3	France	2.8
Yugoslavia	(1)	Italy	.2
Artificial fiber	12.0	Netherlands	.1
Poland	2.1	United States	
Italy	1.9	Cotton	2.0
France	1.5	France	.9
United States	.1	Egypt	.5
Artificial textile fiber	3.3	Italy	.3
West Germany	1.6	United States	(1)
France	1.5	Artificial fiber	1.5
Sweden	.1	France	1.0
United States		West Germany	.3
		Italy	.1
		United States	

[1] Less than $50,000.

There will probably be a market for U.S. fabrics for some years to come, thought it may well taper off as local production increases faster than consumption. This market is almost exclusively one that requires the most inexpensive of fabrics. Quality fabrics will probably continue to be supplied from European sources.

Fabric imports are subject to import quotas that are established by the Moroccan Government, and allocations are made not only to large importers but

SHOEMAKERS: Students in a training school at Marrakech learn here an improved technique from a leather expert.

also to numerous small importers. In many cases, the amounts allocated to small importers are too small to be of interest to many American suppliers. The American supplier may, therefore, wish to be represented locally so that small allocations may be grouped into more reasonable quantities.

Of the over $8 million worth of yarns imported into Morocco in 1963, the United States supplied only $1,600. As in the case of fabrics, this market requires the most inexpensive of yarns for its weaving industry. As spinning capacity increases, yarn imports may taper off if the current trend in the gap between weaving and spinning mill capacity is reversed. As spinning capacity increases, so will imports of synthetic and artificial fibers as well as those of raw cotton and combed wool. While yarns, too, are subject to Government import quotas, weaving and knitting mills are generally of sufficient size to place adequately large orders with American suppliers.

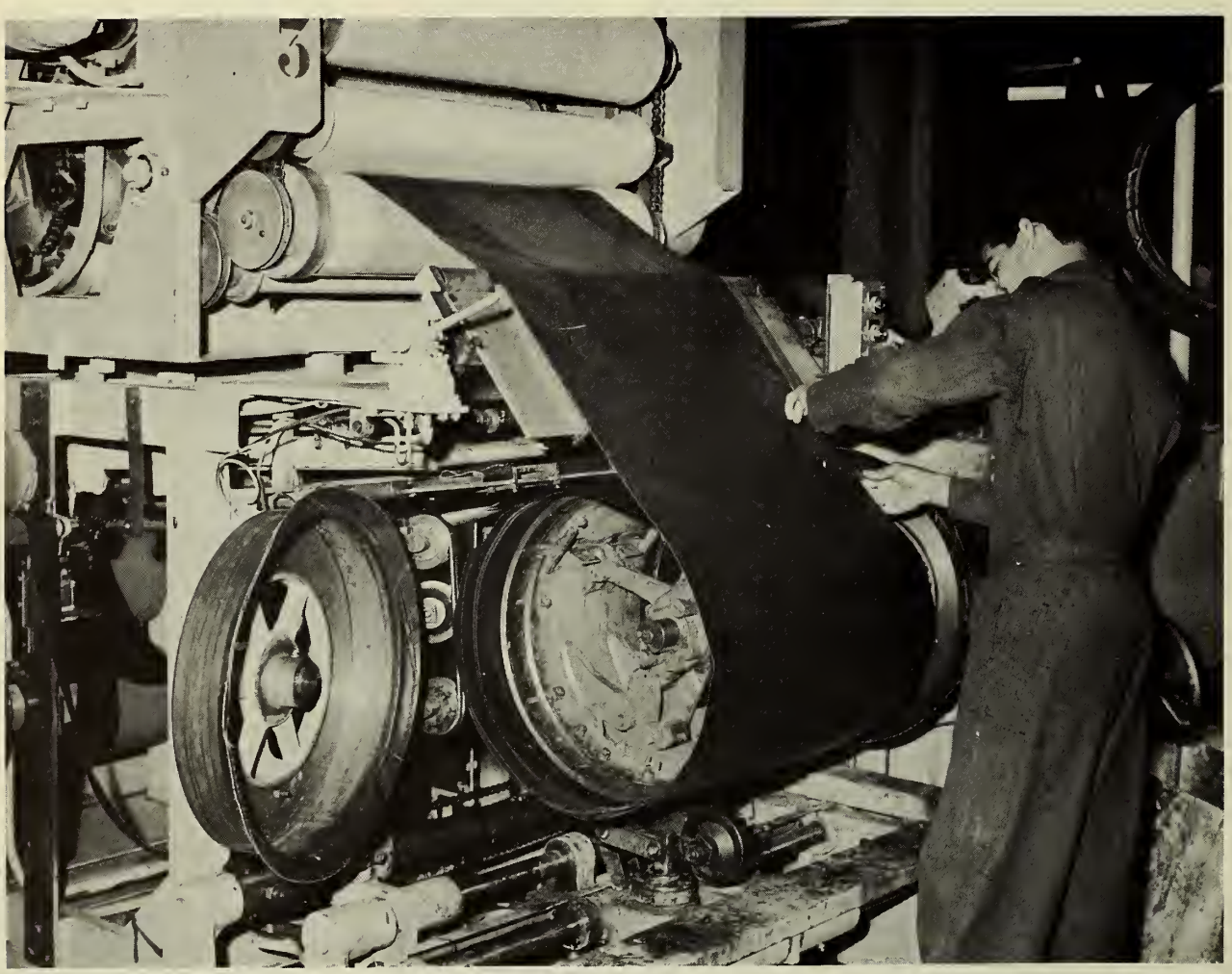
The Moroccan Government anticipates making the following foreign exchange allocations during 1964 for fabrics, fibers, and yarns in millions of dollars:

Fabrics	
Coated and impregnated	0.3
Synthetic knitted piece goods	1.1
Artificial fiber	.2
Woolen	.9
Cotton	8.0
Synthetic fiber	.2
Fibers	
Synthetic and artificial	2.0
Yarns	
Synthetic fiber	1.3
Artificial fiber	1.2
Cotton	.6

These allocations fall under the general import program. Under that program, the Moroccan Government directs the distribution of available foreign exchange reserves among approved imports. These allocations do not include imports that may be effected under bilateral trade or payments agreements. The United States does not have such agreements with Morocco.

Imports of primary paper and paper pulp in 1963 reached a value of almost $8 million. Of this total, the United States supplied only $116,000 worth, practically

***TRUCK TIRE:** The growth of Moroccan industries increases income spendable for goods and services.*



all of which was kraft paper. Data on current imports of primary paper products are given in table 17.

The primary end user and direct importer of paper pulp is the Compagnie Marocaine des Cartons et Papiers, located at Kenitra, Morocco. The paper-manufacturing industry in Morocco has increased production an estimated 34% since 1958. Most notable has been the increase in requirements for kraft paper. Imports of kraft were $650,000 higher in 1963 than in 1956.

The value of these imports by country of origin was in 1963, in millions of dollars:

Paper pulp, coniferous, dry (not more than 40% water)	1.3	Kraft paper	2.0
Sweden	1.0	Sweden	.7
Finland	.2	France	.7
U.S.S.R.	.1	United States	.1
United States		Finland	.1
Waste paper, newspaper, cartons, other paper for manufacturing paper	.7	Miscellaneous paper	3.2
Belgium-Luxemburg	.2	France	2.0
France	.1	United Kingdom	.1
United Kingdom	.1	Finland	.1
United States	(1)	United States	(1)
Newsprint	.6	Cardboard for offices, stores	.3
France	.3	France	.3
Sweden	.2	West Germany	(1)
Austria	.1	United States	
United States			

[1] Less than $50,000.

The citrus industry is currently studying the use of cardboard cartons in lieu of wooden crates for export packing of oranges. One firm has recently established a completely equipped, ultramodern packing station that uses cardboard cartons exclusively. Should this experiment prove satisfactory, many other packers may shift to cardboard cartons. Even with citrus exports estimated for the 1963-64 season at 535,000 tons, the market for kraftliner sales would be worthwhile. In addition, there is reason to believe that, barring unforeseen developments, citrus exports will increase significantly by 1970.

Miscellaneous paper imports include primarily paper boxes and cartons.

As marketing and merchandising techniques and methods improve in Morocco, paper consumption will increase markedly. Morocco's industrialization will help push paper consumption to new heights.

The major end users of synthetic and natural rubber are General Tire and Rubber Co., which locally manufactures tires and tubes, and Societe Marocaine Jacqueau Berjonneau et Cie, which is a compounder and manufacturer of a wide variety of home and industrial rubber products. The combined rate of production of these companies is increasing more rapidly than the rate of consumption in Morocco. Imports of finished rubber products are, therefore, decreasing whereas imports of raw materials are increasing. The net result is augmented raw material imports to meet the increases in local production and consumption. Crude rubber is imported from the United States, at present, under the U.S. Agency for International Development concept known as the Supporting Assistance Program.

Imports of rubber and rubber products are reported in table 18.

The Office Cherifien des Phosphates—OCP uses most of the imported conveyor belt. The estimated 40% increase in phosphate production by 1966 will most probably require more conveyor belt. The OCP's purchases are usually made annually after receipt of bids from interested parties. American firms desiring to compete for this business should communicate with the OCP at Rabat, Morocco. Local representation of the American supplier helps make a sale.

The value of rubber and rubber product imports by country of origin was in 1963, in millions of dollars:

Synthetic and natural nonvulcanized rubber	1.5	Italy	(1)
United States	.6	Czechoslovakia	(1)
France	.5	United States	(1)
West Germany	.1	Rubber conveyor belt	1.1
Canada	.1	France	.7
Nonhardened vulcanized rubber in sheets and rolls	.4	Norway	.1
France	.4	East Germany	.1
		United States	

[1] Less than $50,000.

The OCP buys most of the mine timbers even as it does the conveyor belting. Its current annual requirement is estimated at 17.7 million running feet. Since Morocco's forests are extremely limited, large imports of timber will continue to be necessary.

The value of selected imports of wood products by year was, in millions of dollars:

	1956	*1960*	*1961*	*1962*	*1963*
Coniferous mine timbers, total	0.1	0.2	2.2	2.8	2.0
Pine lumber, sawed, rough, total	.2	.2	4.7	3.7	5.0

The principal suppliers in 1963 of coniferous mine timbers were, in millions of dollars: France, 1.5; Portugal, 0.5; and the U.S.S.R., 0.1. The principal suppliers in 1963 of rough, sawed pine lumber were, in millions of dollars: France, 3.5; Portugal, 1.0; and Spain, 0.4. The United States supplied only $2,000 worth.

OLD CRAFT IN NEW TIME: This skilled metalworker at his bench wears traditional fez and present-day wristwatch.

Imports of plastics in sheets and granules for use in the local manufacture of plastic products has increased by over $3 million from 1956 to 1963, as follows, in millions of dollars:

1956	0.5	1963	3.8
1960	2.0	France	1.8
1961	2.4	Italy	.4
1962	2.7	United Kingdom	.4
		United States	.2

The imports are composed mostly of polyethylene, polystyrene, and polyvinyl chloride—PVC granules in addition to PVC sheets. The sheets are presently manufactured in Morocco and their importation is limited by quotas. Governmental protection of the domestic industry severely limits imports of manufactured plastics, but the use of plastics in Morocco is in its infancy and the market for plastic raw materials will certainly continue to develop.

CHAPTER III

Economic Development Programs

MOROCCO'S DEVELOPMENT plans affect U.S. trade in the immediate need for capital equipment and material as well as in the long run expansion of consumer purchasing power.

DEVELOPMENT PLANNING

Since independence, Morocco has gone through several stages in its formal planning for economic development. The first step was the Two-Year Plan in 1958 and 1959. It emphasized education and social investment. This plan was designed to bridge the gap between the Protectorate and the Five-Year Plan that went into effect in 1960. The Five-Year Plan, which started in 1960 and was to run through 1964, was expected to provide a growth rate of 7%. Almost half the required investment was to have come from private sources. Industry and agriculture were each to receive one-third of the total; other sectors, such as education and public works, the remainder.

Soon, the objectives of the Five-Year Plan were proved unrealistic. Private investment failed to reach the levels predicted. In addition, the already lagging growth rate was further slowed by a drought in 1961, which reduced agricultural production. Then, during the summer of 1963, the Government decided to abandon the plan.

***LIGHT AND POWER:** Electricity for the fertile plain of Tadla to draw water, light lamps, and turn mill wheels.*

To replace the Five-Year Plan, a Three-Year Plan, covering 1965-67, is being drawn up, which is expected to set much less ambitious goals than the preceding plan. Government investment will probably be concentrated on agriculture and education while industry, except for major projects, i.e., the chemical complex at Safi, will be left to private capital. At the same time, the Government promises to make private investment more attractive.

DEVELOPMENT AGENCIES

The Moroccan Government plays an active role in economic development. The Government is, however, interested in having private enterprise play as large a role as feasible. It has provided in both mining and industry for partnership with private capital.

The agency dealing with mining is the Bureau de Recherches et de Participations Minieres—BRPM. This agency covers all mining activities except phosphates which are exploited by another Government agency, the Office Cherifien des Phosphates. One of the fundamental purposes of BRPM is to assist in exploration for minerals. In some cases, it handles exploration on a contract basis for the owner of the mining permit. For big projects, it normally forms a joint enterprise with private capital. The joint enterprise is used for petroleum exploration. BRPM owns a portion of the shares of the major mining companies in Morocco.

In the industrial sector, the Bureau d'Etudes et de Participations Industrielles—BEPI undertakes feasibility studies and participates in industrial projects. The extent of its participation varies from case to case. Among its major projects are a tire factory in conjunction with General Tire; an automobile assembly plant in conjunction with Simca Motor Corporation and Fiat Motor Corporation; a truck assembly plant in conjunction with Automobiles M. Berliet; a textile plant in Fès in conjunction with local capital; and an oil refinery in conjunction with the Italian state petroleum corporation, ENI. While not all of its projects have been successful, e.g., a tractor assembly plant and a cork factory have failed, BEPI has played an important role in Moroccan industrialization.

The Government has also played a major role in providing facilities for tourists, again in cooperation with private capital. For example, a hotel is under construction in Rabat and is financed by Government and local private capital. Spanish capital in partnership with the Government is playing a major role in developing beach resorts along the Mediterranean coast. French capital also in cooperation with the Government is helping develop the Atlantic coast as well as the North.

The chemical complex at Safi, which will process a portion of the country's phosphates, is being built almost entirely by the Government. However, a fertilizer plant at Safi may be operated by a corporation that is owned jointly by the Government and foreign private capital. There is also expected to be a place for private capital in future additions to the complex.

The Banque Nationale pour le Développement Economique—BNDE is a quasi- governmental corporation which is designed to promote economic development. Less than 50% of its stock is held by the Government. The remainder of the stock is held by several international banks, including an American bank and the International Finance Corporation. It makes loans on favorable terms to private entrepreneurs wishing to establish new plants or to expand existing ones. It can participate as a shareholder in industrial firms. It takes the initiative in developing new industries. For example, the bank may undertake the establishment of a company to exploit the off-shore tuna through use of fishing boats larger than those presently in operation. Once the operation is successful, BNDE would sell its participation to private interests.

In agriculture, two Government agencies, the Office National des Irrigations—ONI and the Office National de la Modernisation Rurale—ONMR deal with irrigated and dry land farming, respectively. Three agencies assist Moroccan farmers in improving their farming methods, thus increasing agricultural production and raising the standard of living. To assist farmers, each agency has a series of centres de travail throughout the country and maintains pools of equipment. The equipment can be used by individual farmers under certain conditions. ONI is also involved in the construction and maintenance of irrigation works. These works range from digging small ditches to the construction of the Mechra Klila dam on the Moulouya River in eastern Morocco. This project will eventually irrigate 1,500,000 acres of land. In addition, ONI is developing the cultivation of sugar beets in Morocco. It has already constructed one sugar beet refinery and plans to construct several more.

In addition to the centres de travail, which do a good amount of farming on their own account, the ONI and the ONMR cultivate land taken over from French colons under the Government's land reform program. The final disposition of these lands has not been settled, but it seems clear that ONI and ONMR will be

responsible for farming large areas of land for the next several years.

As a result, ONI and ONMR purchase all sorts of supplies for farm operation. Among these purchases are seed, fertilizer, and insecticides as well as all sorts of tools and agricultural machinery and equipment.

Further details of Government procurement in general may be found in chapter VI under the section, Government Procurement.

FRENCH AID

France continues to play an important part in Morocco's economic development since independence. Under the terms of a technical and cultural cooperation agreement with France, Morocco receives the services of some 9,000 Frenchmen, two-thirds of whom are teachers and the remainder technicians of various types. The French Government pays a portion of the salaries of these persons. In addition, the French Government operates at its own expense an extensive school system which, while intended primarily for French children, serves as an important supplement to the Moroccan educational effort. As more trained Moroccans become available, French teachers and technicians will no longer be needed.

American businessmen should not underestimate the substantial amount of indirect assistance these technicians give to a continued high level of French exports of both goods and services to Morocco, particularly where Government purchases are concerned.

Morocco receives important benefits from the customs-free quotas which France grants to certain Moroccan products. These quotas date from the days of the Protectorate and provide extremely remunerative markets for Morocco. They are particularly important for the wine, citrus, and canned fish industries. They have been so remunerative and protective that local industry has tended to be less competitive than similar industries in other producing countries. With the growth of the Common Market, these quotas, although accepted as transitional measures, are bound to disappear. Morocco hopes to replace them with an agreement with the Common Market itself.

France has provided for several years economic assistance in the form of Government-to-Government loans and grants. Direct French-financed aid in 1962 equaled $20 million and in 1963, $42 million. In addition, special credit facilities to finance French exports to Morocco were made available, but have not been widely used because of their rather strict terms. Furthermore, the Bank of Morocco also benefits from an overdraft facility with the Bank of France.

A substantial portion of French aid has been given in support of Morocco's development budget and has not been tied to purchases of French goods. Another portion has been provided for specific projects; some of this, particularly the development of the Moroccan television network, has been tied to French procure-

***INDUSTRIAL STUDY:** Model of a chemical complex, Safi.*

ment. The French appear to place greater emphasis now than in the past on loans for specific projects and on procurement in France.

AMERICAN AID

In the years since independence, the United States has provided Morocco with economic assistance worth a little more than $400 million. Of this sum, almost $149 million was provided under Titles I, II, and III of Public Law 480 in the form of surplus agricultural commodities.

Particularly in the years following independence, the major portion of U.S. aid was in the form of Supporting Assistance, which until the conclusion of a series of Public Law 480 agreements, was made up principally of agricultural products, i.e., tobacco, wheat, soybean oil, edible and inedible tallow, and cotton. Supporting Assistance also permitted imports of materials for Morocco's industrial development, e.g., industrial machinery, motor vehicles and spare parts, construction and mining equipment, and farm implements and machinery. Until 1962, procurement from any free world source was authorized. Since that time, purchases made with these funds have been limited to products manufactured in the United States.

To date, Morocco has received only one Development Loan under the U.S. aid program. This loan was made for $23 million and is intended to finance construction of the Nechra Klila dam, its irrigation structures and related land development. In the future, more emphasis will be placed on project loans than on Supporting Assistance, which is a form of aid de-

***WATER CONTROL:** The Moroccan plain, even as the American West, benefits from water stored in a lake behind a dam.*

signed to help satisfy the Government's general financial needs. The United States has indicated its willingness to provide a loan to finance the conversion of the former U.S. Air Force Base at Nouasseur, outside of Casablanca, into a civil, intercontinental, jet airport. The United States will also consider other loan applications and is prepared to authorize loans where the projects will make a positive contribution to economic development.

Five million dollars of American aid has been used for technical assistance. This money has financed special training programs for almost 300 Moroccan administrators, educators, professional persons, industrialists, farmers, and students. In addition, a number of American technicians have come to Morocco to impart their technical knowledge. This program has covered a number of fields, including livestock care and modern poultry raising. Other programs have dealt with industrial feasibility studies and the training of rural teachers.

Two agreements under Public Law 480 Title I provide for sales of U.S. surplus agricultural commodities for local currency. They have provided for the sale of wheat, vegetable oils, cotton, and tobacco worth just over $19.7 million at world market prices. Early in 1964, the Moroccan Government requested a further Title I agreement. Since Morocco is a wheat-producing area, it is unlikely that further Title I agreements will include wheat, except in drought years.

Information on a regular basis about products that may be imported into Morocco under the U.S. aid program may be obtained from the Agency for International Development, Office of Small Business, Washington, D.C., 20523. That office has procurement data in the form of Small Business Circulars on specific proposed purchases. It also has trade and general information in the form of Small Business Memos on AID procurement for countries with which the United States has a foreign assistance program.

U.N. AND OTHER AID

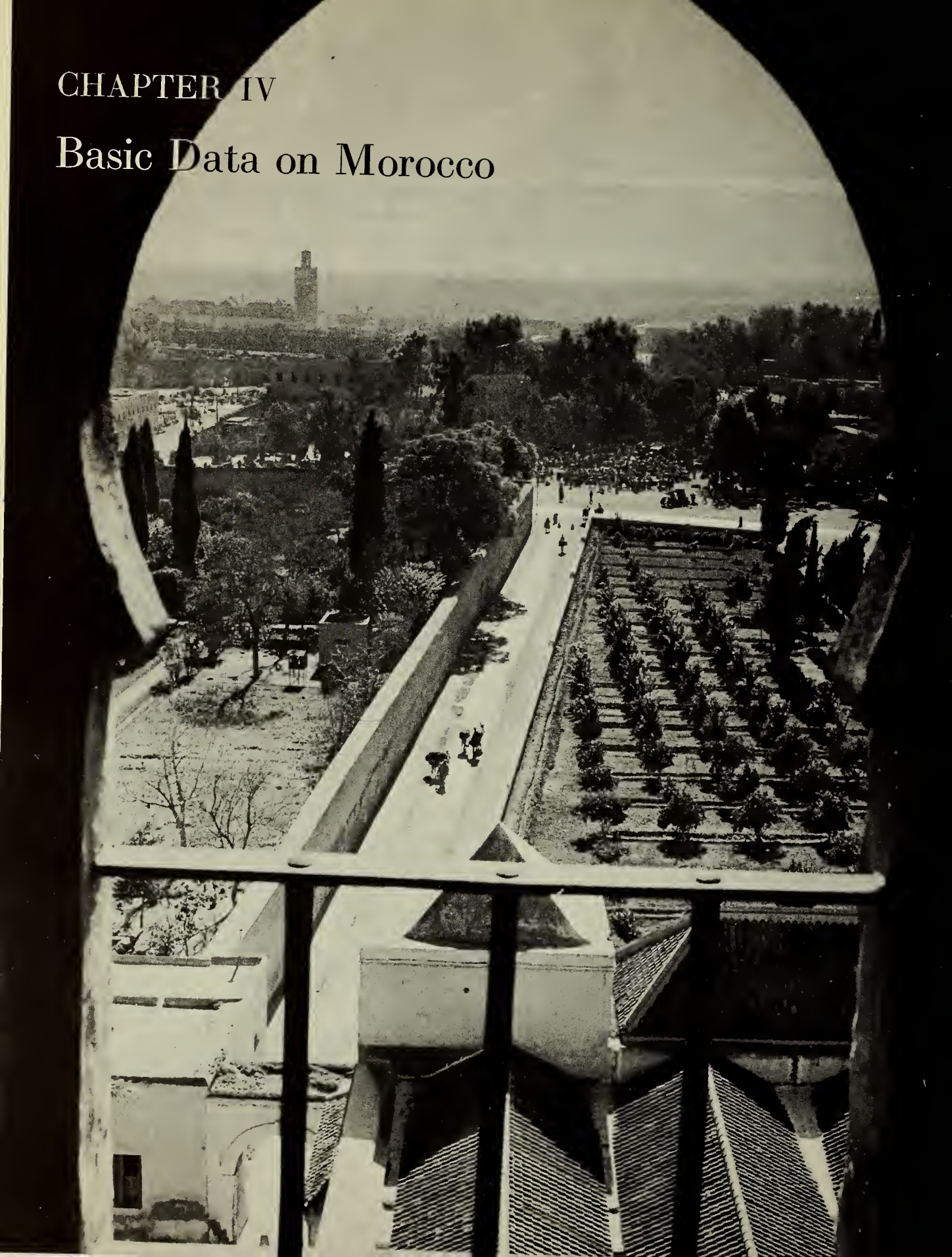
United Nations assistance programs in Morocco began in 1959 and have amounted to almost $12 million. Assistance has been given in health, education, rural development, and worker training.

West Germany has committed $20 million to infrastructure projects in connection with the Safi chemical complex. Revisions in the plans for the complex have reduced its estimated cost, mainly the improvement and expansion of harbor facilities. Thus, a part of this credit may be used for other projects.

Yugoslavia, Poland, Czechoslovakia, and Spain have also assisted Morocco with loans, credits, and technical service.

CHAPTER IV

Basic Data on Morocco



Morocco, slightly larger than California, occupies some 172,000 square miles of the northwestern corner of Africa and has nearly 1,700 miles of coastline. It borders on Algeria in the east on the Mediterranean coast to the Spanish Sahara in the southwest on the Atlantic. A large section of the southern portion of the frontier with Algeria has not yet been defined. The Atlantic forms the western boundary, and the Mediterranean, the northern. The Spanish retain the enclave of Ifni south of Agadir, the two presidios of Ceuta and Melilla, and three small offshore islands on the Mediterranean coast.

GEOGRAPHY

A series of mountain ranges divides the country into two sectors: an Atlantic region to the north and west, and a Saharan region to the south and southeast. These ranges are made up of the High Atlas, Middle Atlas, and Anti-Atlas mountains, which begin on Morocco's southern Atlantic coast, run inland and then northeastward towards the Mediterranean. These ranges join the Rif Range, which parallels the sea. Peaks in the Atlas range up to 13,665 feet in elevation. This chain of mountains constitutes Morocco's water reservoirs and forms a climate barrier. The Atlantic region is semitropical and favors forestry and agriculture. Rain falls irregularly and is a limiting factor in land cultivation. The recovery and utilization of rainfall determine progress in agricultural production.

The pre-Saharan region, arid and sparsely settled, consists of steppes and desert that are inhabited chiefly by shepherds.

← KOUTOUBIA GARDEN, MARRAKECH: Room above a cultivated plot in the city with a view of the Grand Atlas.

CLIMATE

Morocco's climate bears some resemblance to that of California. The Atlantic region has winters that are generally cool and rainy while the summers are rather hot and without rain in the coastal areas and very hot and dry in the interior.

A picture of the climate is obtained from table 19, which presents the average temperature and annual rainfall in selected cities.

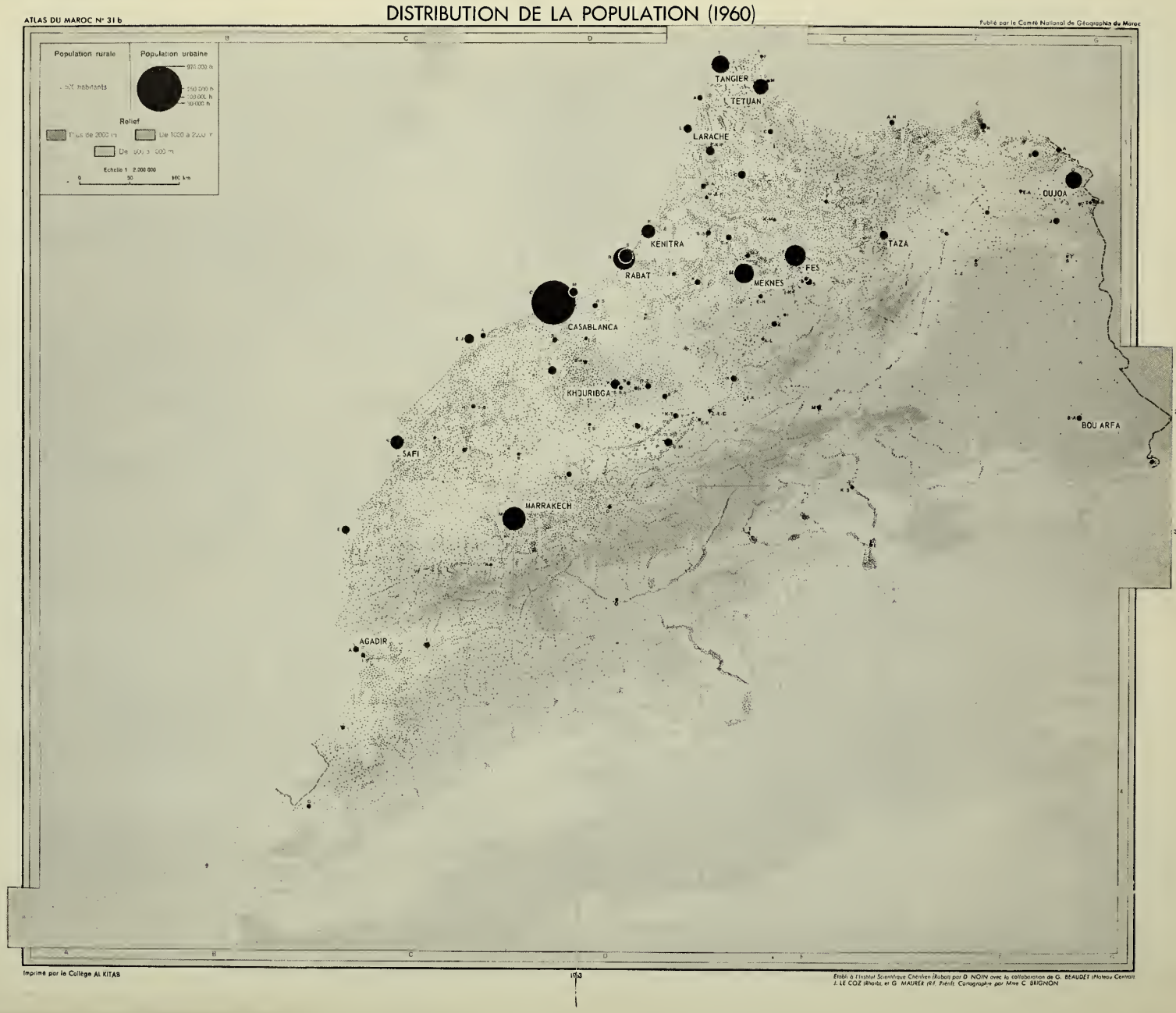
The areas to the south and southeast of the Atlas range are desert and semidesert. The High and Middle Atlas are snow covered during the winter months, permitting successful operation of tourist winter sports areas. Although average rainfall is adequate for agriculture, the amount of rain that falls varies substantially from year to year. As a result, there are periodic droughts and occasional floods, which cause serious crop failures.

PEOPLE

As might be expected from its location, the Moroccan population is made up of a variety of ethnic strains. Of the total population of 13,103,000, Moslems number 12,683,000, who are mainly Berber or Arab. The Berbers, who make up the largest single element of the population, were apparently the earliest arrivals. They remain a distinct group in the mountains. Following the rise of Islam in the seventh century, the Arabs arrived in force and extended their influence from Morocco into southern Spain. From the south came Negroes, both as slaves and as settlers. These people have frequently intermarried. Persons of Jewish faith number around 117,000 and constitute an important segment of the population, particularly where they are active in commerce and industry. The European population, which has dropped since 1956, numbered about 303,000 at the end of 1963.

Following the expulsion of the Arabs from Spain in the 15th century, Morocco was governed by sultans, who reigned over the various tribes with varying degrees of effectiveness. In 1912, a protectorate was established. France controlled the larger part of the country while Spain occupied most of the Mediterranean coast. The city of Tangier was given international status.

The Protectorate ended in 1956 when the French and then the Spanish gave up their positions as pro-


ATLAS DU MAROC N° 31 b
DISTRIBUTION DE LA POPULATION (1960)
Publié par le Comité National de Géographie du Maroc
Population rurale
Population urbaine
Relief
Echelle 1 2.000 000
TANGIER
TETUAN
LARACHE
OUJDA
KENITRA
TAZA
RABAT
FES
MEKNES
CASABLANCA
KHOURIBGA
BOU ARFA
SAFI
MARRAKECH
AGADIR
Imprimé par le Collège AL KITAB
1963
Établi à l'Institut Scientifique Chérifien (Rabat) par D. NOIN avec la collaboration de G. BEAUDET (Plateau Central) J. LE COZ (Rharb) et G. MAUREE (Rif). Présenté Cartographie par Mme C. BRIGNON

tecting powers. Tangier was also turned back to the Moroccans and was fully integrated into the economy in 1960. At the time of its independence, Morocco was in theory an absolute monarchy although in practice it allowed partisan political activity. In December 1962, a constitution, approved by popular referendum, established a parliamentary form of government. The King retains considerable power under the Constitution. The country's first elected parliament began sessions in November 1963, and the transition to a constitutional monarchy got underway.

POPULATION

Table 20 presents a picture of Morocco's population growth since 1936.

There have also been notable shifts in the distribution of population between urban and rural places. See table 21.

Increases from 1960 to 1964 in Moroccan urban population are greater than those in the rural population. This is so even though the birth rate is similar. First, the infant mortality rate in the cities is far less than in the country because of better health facilities. Second, Moroccans too migrate from the country to the city.

It is currently estimated that 27% of the Moroccan population lives in urban areas, that is, places of more than 5,000 inhabitants.

The current average population growth rate is estimated at 3% and may increase to 3.2 or 3.3% by 1970. These estimates are made even though the population grew an average of only 1.5% between 1936 and 1952.

Population by age group is reported in table 22.

The decrease in the foreign population as well as the shifts in foreign population percentage by age groups from 1960 to 1964 and to 1970 are now and shall continue to be largely the result of Moroccanization of personnel in both industry and commerce. Foreigners will probably remain in those jobs requiring management and industrial skills that have been acquired through training and years of experience. Thus, the total purchasing power of the foreigners should not decrease in direct relation to the anticipated decrease in their numbers shown in table 22.

Table 23 shows the estimated distribution of the active population in Morocco in 1964 according to industry group.

***YOUNGEST HAND:** Shepherd with a clear eye and a steady hand watches over his flock by day in a Moroccan field. One half of the Moroccan population of Morocco is 19 years old or younger, that is, in the 0 to 19 year age group. This proportion among the Moroccans is expected to continue in 1970.*

CHAPTER V

Channels of Distribution

PRINCIPAL CHANNELS OF DISTRIBUTION in Morocco consist of the chief populated places, railroads, highways, air routes, and seaports.

PRINCIPAL CENTERS

Casablanca

The largest of its cities is a newcomer. Only as recently as the end of World War I was Casablanca's future as a major seaport decided by the French Protectorate. Today, it is not only the principal seaport and airport in the country, but also its economic, commercial, financial, industrial, press, and organized labor center. With the exception of crude petroleum, the port of Casablanca receives three-fourths of the country's imports. Casablanca's importers and distributors, in turn, send the merchandise countrywide through their own distribution network or through wholesalers.

Marrakech

Internationally famous tourist attraction, former capital of the South, Marrakech's 13th century edifices stand today as a reminder of its historical importance. It is still, as in former times, the crossroads of the Berbers from the mountains, the Sleus from the southern valleys, the Blue Men from the Sahara, and the Arabs from the North. Third largest city in Morocco, it is a center for the sale of traditional Moroccan wares. While Marrakech has little modern industry, it is a major center for the production of apricots, olives, and handicrafts.

Rabat

Rabat is the political capital and seat of government where Roman ruins blend with ultramodern western architecture and traditional Moroccan design.

Fès

Intellectual and religious capital of Morocco, Fès is proud of its Karaouine University, the oldest in the

← CASABLANCA: Moroccan seaport on the Atlantic Ocean has facilities for carrying on business with the wide world.

entire Arab world. Since the conversion of Jews to Islam in the seventh century, Fès has been the religious capital of Morocco. It is a major center for the spinning and weaving of modern textile fabrics. In the traditional sector, its artisans are known throughout the world for their handicraft work. Fès is one of the major tourist attractions.

Meknès

Though Fès, too, lies in one of the richest agricultural regions of Morocco, Meknès, some 35 miles away, is undoubtedly the agricultural capital of the country. Meknès is located almost in the middle of the vast and rich cereal and wine producing areas of the country. Slightly to the north of Meknès, two-thirds of Morocco's citrus is grown. Except for the processing of agricultural products, Meknès is practically devoid of industry.

Tangier

Tangier is the center of tourism in Morocco and gateway to Morocco from Europe. Its port is one of the oldest on the Mediterranean and its grotto of Hercules is a renowned tourist attraction. International city for many years, Tangier is endeavoring to find a new vocation with its complete integration into Morocco in 1960.

Safi

Owing to its large exports of phosphates, Safi is the second port in Morocco. In addition, it is the center of Morocco's fishing and fish-processing industry. Furthermore, a large chemical complex is currently being built there by the BEPI. Phosphoric acid is to be produced at that plant by the middle of 1965. Eventually, the plant is to produce triplesuperphosphates at an annual rate of 275,000 tons. Production of ammonium phosphate is currently under study.

Agadir

Second in Morocco to Safi in the fishing and fish-processing industry, Agadir is the agricultural center for the Souss River valley. Agadir is successfully rebuilding after the devastating earthquake of 1960 and, with its mild climate and long beaches, will once again become a haven for tourists.

RAILWAYS

Morocco's rail network extends from Marrakech in the south to Tangier on the Mediterranean and from Safi on the Atlantic to Oujda at the Algerian border. The network's length is 1.192 miles of which 429 miles are electrified and the remainder, diesel operated. It is built in standard gage. Its traffic in 1963 totaled 309 million passenger miles and 1.259 million revenue ton/miles of freight. It is operated by the Office National des Chemins de Fer, an agency of the Government.

APARTMENT IN CASABLANCA: Top-floor windows that face west yield a view of the harbor and the Atlantic Ocean.

ROADS

Morocco's highway system is one of the finest and most complete in the whole of Africa. There are 7,145 miles of paved primary and secondary roads. Tertiary roads extend for over 4,600 miles of which 2,750 miles are surfaced. In addition, an unsurfaced network extends over 23,000 miles.

With the railroad system, this highway network ensures the transportation necessary for internal distribution of goods. Road freight in 1963 amounted to over 241 million revenue ton-miles.

Intercity, common carrier, road freight is allocated exclusively by the Office National de Transport, an agency of the Government, among the various privately owned, Government-licensed truckers. Merchandise hauled by private firms for their own account is excluded from this allocation.

AIR TRANSPORT

Royal Air Maroc, a Government-controlled corporation, has a monopoly in scheduled domestic air transport.

Twelve foreign airlines presently serve Morocco on regularly scheduled international flights through three airports: Casablanca, Rabat, and Tangier. Air France has by far the most complete schedule. Pan American is the only American airline serving Morocco; it comes through once a week. Trans World Airlines maintains an off-line district sales office in Casablanca.

All airlines, including Royal Air Maroc, transported during 1963, 356,000 passengers and over 6,500 tons of freight.

The Government has announced plans to convert soon the former U.S. Air Force base at Nouasseur, outside of Casablanca, into an international, civil airport capable of handling intercontinental jet aircraft.

PORTS

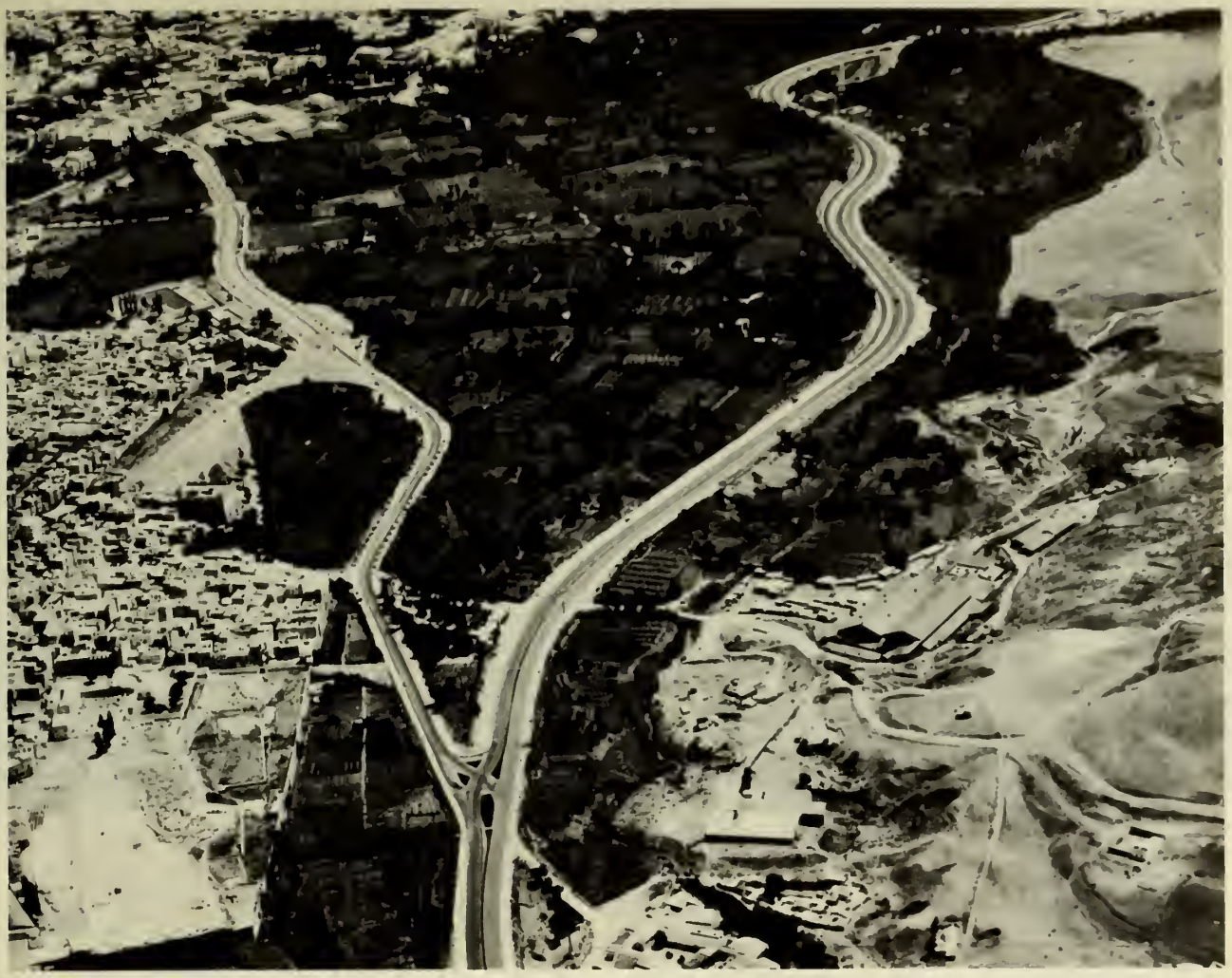
Morocco is served by six major ports on the Atlantic coast: Casablanca, Safi, Mohammedia, Kenitra, Tangier, and Agadir. In addition, on the Atlantic, there are the harbors of El Jadida and Essaouira. These ports are mentioned in table 24.

Approximately 6.6 million tons of Casablanca's exports and 2.8 million tons of Safi's were phosphates in 1963. Kenitra and Mohammedia specialize in the importation of crude petroleum; Kenitra and Agadir, in export citrus.

Tangier handles more passengers than any other Moroccan port. It possesses Morocco's only free port, which is located in the dock area and is operated by the Societe du Port, a private firm operating under a concession from the Government.

The free port occupies 75,300 square feet and is equipped with several warehouses and sheds whose total floor space is 29,100 square feet. Its small size precludes long-term space rental.

Goods imported in the free port zone must comply with all regulations governing other imports, must meet sanitary requirements, must not be subversive nor pornographic in nature, must not consist of munitions or drugs. Goods may remain in the free port for up to 2 years. Storage charges every 2 weeks are 0.92 cents per square foot in open storage and 2.75 cents per square foot under cover. There is a 44.8 cents per ton charge for moving goods in and out of the free port zone. An ad valorem tax of 1% is paid on all goods entering the free port. The port permits commercial operations, such as mixing, screening, dividing, and sorting. Retail sales are not authorized. It is estimated that movement of goods into the free port area in 1963 amounted to 4,100 tons of which sugar accounted for 3,300 tons



FÈS: Highways promote the commerce of Fès, a principal commercial city of Morocco and a sacred city of Islam.

Casablanca is a major international seaport. In 1963, it handled 10.2 million tons of all types of cargo. See table 25. This compares favorably with such United States ports as Newport News, Virginia, and Jacksonville, Florida, that handled similar cargo tonnage in 1963.

Ship movement into Casablanca has increased considerably over the years as noted in table 26.

Protected navigable water area in the port covers more than 270 acres. Total dock length exceeds 17,500 feet. More than 100 cranes and hoists of various types, varying in lifting capacity from 5 to 165 tons, are available for handling of cargo. Grain elevator capacity is 33,000 tons at present and is to be increased to 44,000 tons by 1965 and to 77,000 tons by 1970. Open storage areas amount to 2.2 million square feet; covered storage areas, to 1.6 million square feet. Total storage capacity is estimated at 463,000 tons. Over 1,200 tons of refrigerated storage is also available in addition to 770 tons of 0°F general merchandise storage. Any vessel having a draft of not more than 32.5 feet can be accommodated in the port.

The total number of foreign vessels calling at Casablanca with percentage of U.S. vessels, 1958, 1960, and 1963 were:

	Number of Foreign Countries	*Percentage of U.S. vessels*
1958	28	4.2
1960	32	3.9
1963	30	3.9

Casablanca is regularly served by well over 100 foreign and U.S. maritime companies. Among them, the American lines are: Central Gulf Steamship Corp., Levant Line, Stockard Line, Prudential Steamship Corp., States Marine Lines, Stevenson and Company, Waterman Steamship Corp., Marine Transport Line, Inc., Lykes Bros. Steamship Co., Inc., and American Export Isbrandtsen Line.

CHAPTER VI

Trade Practices

WORLD PORT: Casablanca, Morocco, North African harbor, can accommodate many of the big oceangoing freighters.

Businessmen in Morocco are experienced foreign traders who are well informed on the courtesies and practices of their business.

IMPORTING METHODS

All types of foreign trading enterprises are found in Morocco. The multiplicity of importers is striking. Innumerable firms, including over 400 import-export firms in Casablanca alone, import for distribution and resale. Industrial firms, large and small, frequently prefer to import raw materials themselves. They seek to effect economies by eliminating the local agent or distributor. They often feel that the local agent or distributor has not been able to demonstrate his value. On the other hand, agents and distributors attach considerable importance to exclusive agreements and are frequently most reluctant to take on new representation, particularly where this involves service and spare parts, unless receiving an exclusive agreement from the outset.

Salesmanship is not usually practiced as diligently nor as energetically as in the United States. On that account, American firms that export to Morocco must encourage their local representative to develop this market with vigor. For example, a local representative of an American firm contented itself with stocking an inconspicuous main store display of the firm's products and made no other sales effort. Needless to say, results were disappointing. The American firm, without surveying the matter in depth, deduced that sales were negligible owing to market limitations. Sometime later another representative convinced the American firm that it should be given the representation. This local representative was an aggressive, hard hitting, and salesminded. Immediately, sales were substantial. Within a short time, the American firm had a problem not of sales but of supply. The market had not changed, the approach had.

The Moroccan market is a highly competitive one, and aggressive selling methods are as indispensable in Morocco as in the most sophisticated markets.

QUOTATIONS AND TERMS

Sales quotations should be given c.i.f. port of destination with these details: f.o.b. port of shipment, including any inland freight, and actual charges for ocean freight, insurance, and handling. All of these details are essential to the Moroccan importer who wishes to obtain the necessary import license. Quotations f.o.b factory that do not also show inland freight and handling charges are completely without value to the importer in Morocco and will either be disregarded by the importer or will cause him additional correspondence with the American supplier in order to ascertain these amounts. Quotations should be made in dollars.

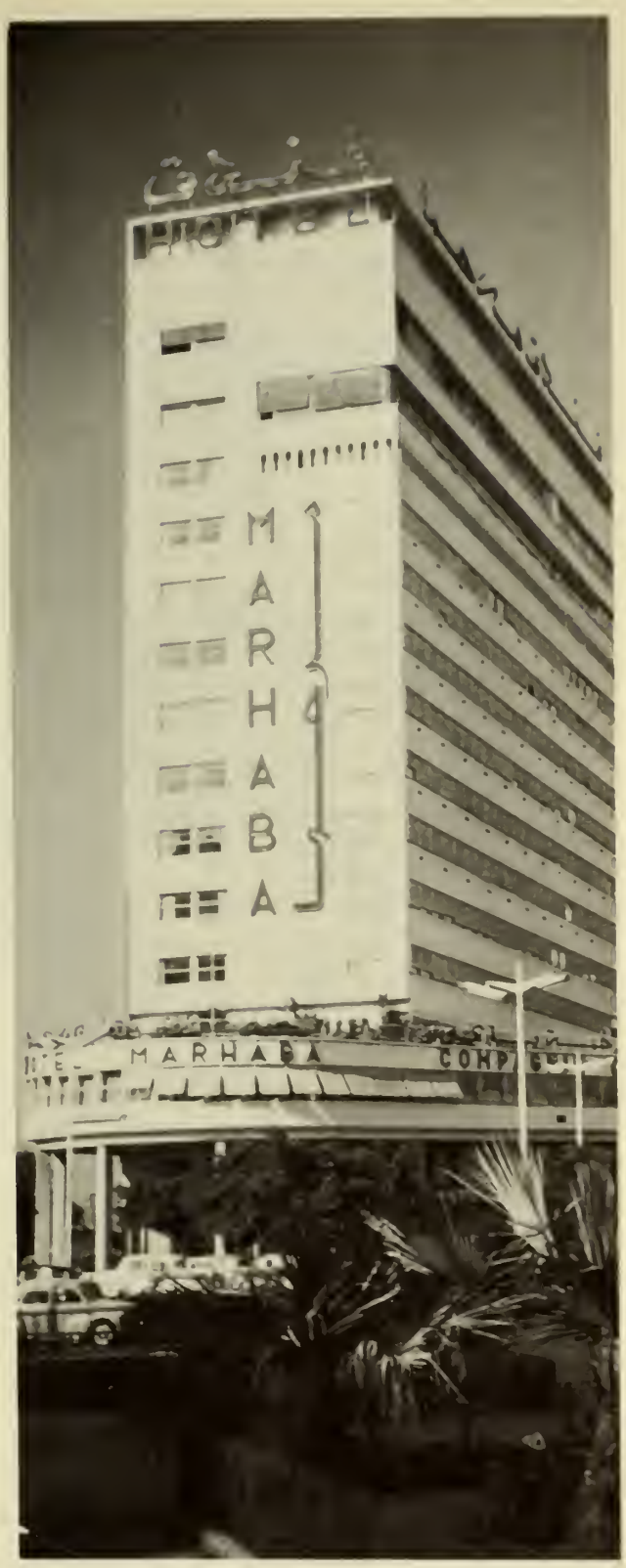
Shipments financed under the U.S. Agency for International Development—AID—must normally be transported in American flag vessels. Other than AID-financed shipments may be made without regard to the flag of the vessel.

Consumer, industrial, and capital goods that are available from stock and require no special modification for the individual customer are most frequently paid for by sight drafts that are due on receipt of documents by the importer at the port of destination. Sixty percent of Morocco's imports are paid for in this manner, regardless of the country of origin, according to Moroccan bankers. In addition, 15% of Morocco's imports are paid for with 30-, 60-, or 90-day notes or on open account. The remaining 25% are paid for by irrevocable credits opened at the time the order is placed with the foreign supplier. This is generally the case for industrial and capital goods that are not considered stock items.

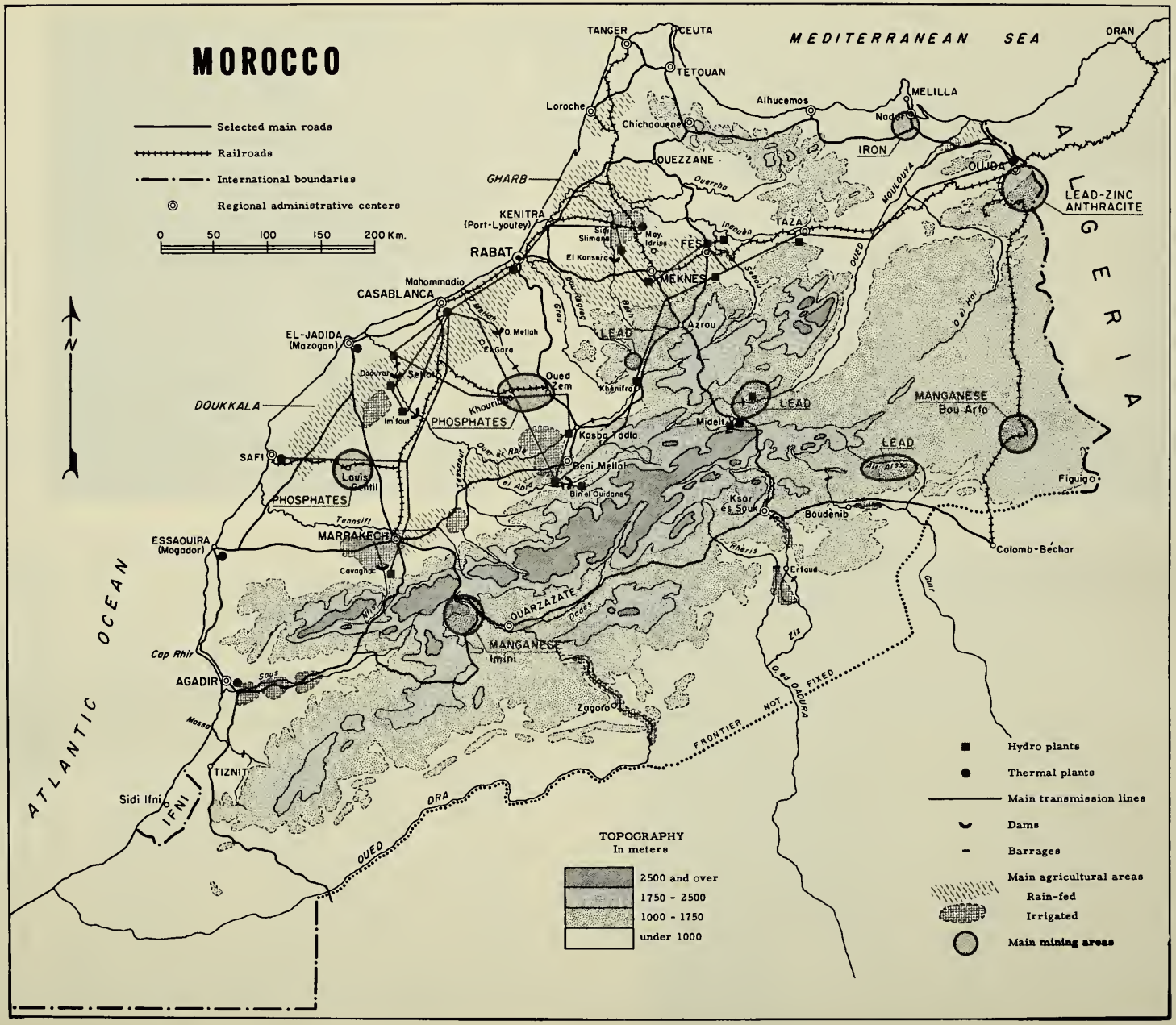
The bill must be paid in full prior to the expiration of the transfer validity date of the import license, which is usually 8 months after issuance. Any sales providing for payment beyond this date must have prior written approval of the Moroccan Foreign Exchange Office in Rabat. In general, this approval will be granted.

Knowledge of the market and of the customer must determine the greater use of sight drafts, time drafts, payment against documents, and open accounts. In view of the substantial competition built up in the Moroccan market, terms may, in many cases, need to be relaxed.

Suppliers can adequately protect themselves against political and commercial risks by insuring, in dollars, their export sales through the Foreign Credit Insurance Association—FCIA, whose headquarters are at 110 William Street, New York, N.Y., 10004.



***MOROCCAN TRAVELER:** In carrying on international trade, the businessman may stop at this hotel in Casablanca.*


MOROCCO
Selected main roads
Railroads
International boundaries
Regional administrative centers
0 50 100 150 200 Km.
MEDITERRANEAN SEA
ATLANTIC OCEAN
ALGERIA
TANGER
CEUTA
TETOUAN
ORAN
MELILLA
Alhucemas
Nador
Loroche
Chichaouene
IRON
OUEZZANE
GHARB
OUJDA
LEAD-ZINC ANTHRACITE
KENITRA (Port-Lyoutey)
TAZA
RABAT
FES
MEKNES
Mahommadia
CASABLANCA
EL-JADIDA (Mazagan)
LEAD
Azrou
DOUKKALA
PHOSPHATES
Oued Zem
Khenifra
Kosba Tadla
MANGANESE Bou Arfa
Midelt
Beni Mellal
SAFI
Louis Gentil
Figuig
Ksar es Souk
Boudenib
Colomb-Béchar
ESSAOUIRA (Mogador)
MARRAKECH
Erfoud
OUARZAZATE
MANGANESE Imini
AGADIR
Cap Rhir
Sidi Ifni
IFNI
TIZNIT
Zagora
FIXED FRONTIER NOT
OUED DRA
TOPOGRAPHY
In meters
2500 and over
1750 - 2500
1000 - 1750
under 1000
Hydro plants
Thermal plants
Main transmission lines
Dams
Barrages
Main agricultural areas
Rain-fed
Irrigated
Main mining areas

CREDIT FACILITIES

The Moroccan businessman, perhaps to an even greater extent than the one in the United States, uses credit to finance his business. Much of this credit is in the form of overdrafts and both sight and time drafts. His working capital is generally extremely low and in most cases far below an amount that would be considered a minimum by his American colleagues. Usually, imports are financed through the extensive use of sight drafts and overdrafts.

Money from the sale of imports is very frequently reinvested rather than used to reduce overdrafts. The Moroccan businessman can usually derive a greater return on reinvestment than the 6 to 8% interest that he must pay on his overdraft. Reinvestment also provides him with a hedge against devaluation. In some instances, the money from the sale of imports is retained in currency in the businessman's vault.

The Bank of Morocco, the nation's central bank, in Rabat, in its desire to reduce the extent of credit requires that the commercial banks maintain 45% reserve liquidity. This requirement has resulted in a general tightening of credit, a reduction in the importation of consumer items, and what is considered to be a healthy decrease in stock levels. The commercial banks are, as a result, more selective than heretofore in granting overdrafts and are endeavoring to reduce the higher risk overdraft accounts. Under this requirement, the small Moroccan businessman is most immediately affected.

The foreign businessman in Morocco follows, in general, financing practices that are more nearly similar to those currently in use in Europe.

There are 22 commercial banks in Morocco, most of which have an extensive branch system throughout the country. The six largest of those banks account for nearly 70% of the deposit accounts in Morocco. Most of these deposits are held by foreign businessmen and large corporations, not Moroccan businessmen. Customers' notes discounted by the commercial banks are usually rediscounted by the Central Bank, which thus fixes discount and interest rates throughout the country.

All commercial banks provide credit and financial information on businessmen and firms in Morocco. This information can usually be obtained by the supplier through his own bank in the United States.

Additional banks in which the Government participates are the Banque Marocaine du Commerce Exterieur, the Banqua Populaires, and the Banque Nationale pour le Développement Economique.

In the Banque Marocaine du Commerce Exterieur the Government owns 50% of the stock. The balance is held by several international banks, including one American bank, and a few private investors. In addition to normal banking operations, the bank is charged with facilitating both sales opportunities abroad for Moroccan products and the importation of supplies and equipment necessary to the economic growth of the country.

The Banques Populaires are controlled by the Government and are designed to supply credit to the small Moroccan manufacturer, includings artisans, and businessmen.

The Banque Nationale pour le Développement Economique is owned 50% by the Moroccan Government and 50% by private interests that usually are international banks, including an American one. It specializes in the granting of loans for equipment that is destined for use in projects that stimulate investment and accelerate economic progress.

Other Government credit institutions operate credit facilities for specialized uses, e.g., La Caisse de Prêts Immobiliers du Maroc for financing real estate investment, La Caisse Marocaine de Marchés for supplying short-term credit for international business transactions, La Caisse Nationale de Crédit Agricole for providing farm credit.

World Trade Directory reports on many Moroccan firms can be made available to American suppliers through U.S. Department of Commerce Field Offices or from the Commercial Intelligence Division of the Department of Commerce, Washington, D. C.

TRADE CUSTOMS

Although the official language of Morocco is Arabic, Government publications and services are readily available in French. Correspondence and discussions may be conducted in French without the slightest prejudice to the businessman.

The most commonly used language in foreign trade and commerce is French. Spanish, however, is used in the ex-Northern Zone and also in Tangier. Even in Tangier and the ex-Northern Zone, Government officials tend to have a greater knowledge of French than of Spanish.

English, whether written or spoken, is not used in Government or private circles. Knowledge of English in Morocco is far less common than in French-speaking areas of Europe.

The businessman who does not possess some knowledge of French may find himself seriously handicapped in Morocco. Though interpreters and translators can be found, competent ones are rare indeed.

Business correspondence, documentation, and literature, even from non-French speaking countries, are almost always prepared in French. Even in those rare instances when a factory manager has an adequate knowledge of English, correspondence and documentation in English present severe handicaps to a non-English speaking organization. When an American bid in English is not particularly advantageous compared to those of other foreign suppliers, the local purchaser may well give preference to the foreign bid written in French. Tender bids in English, whether Government or private, may not receive full consideration.

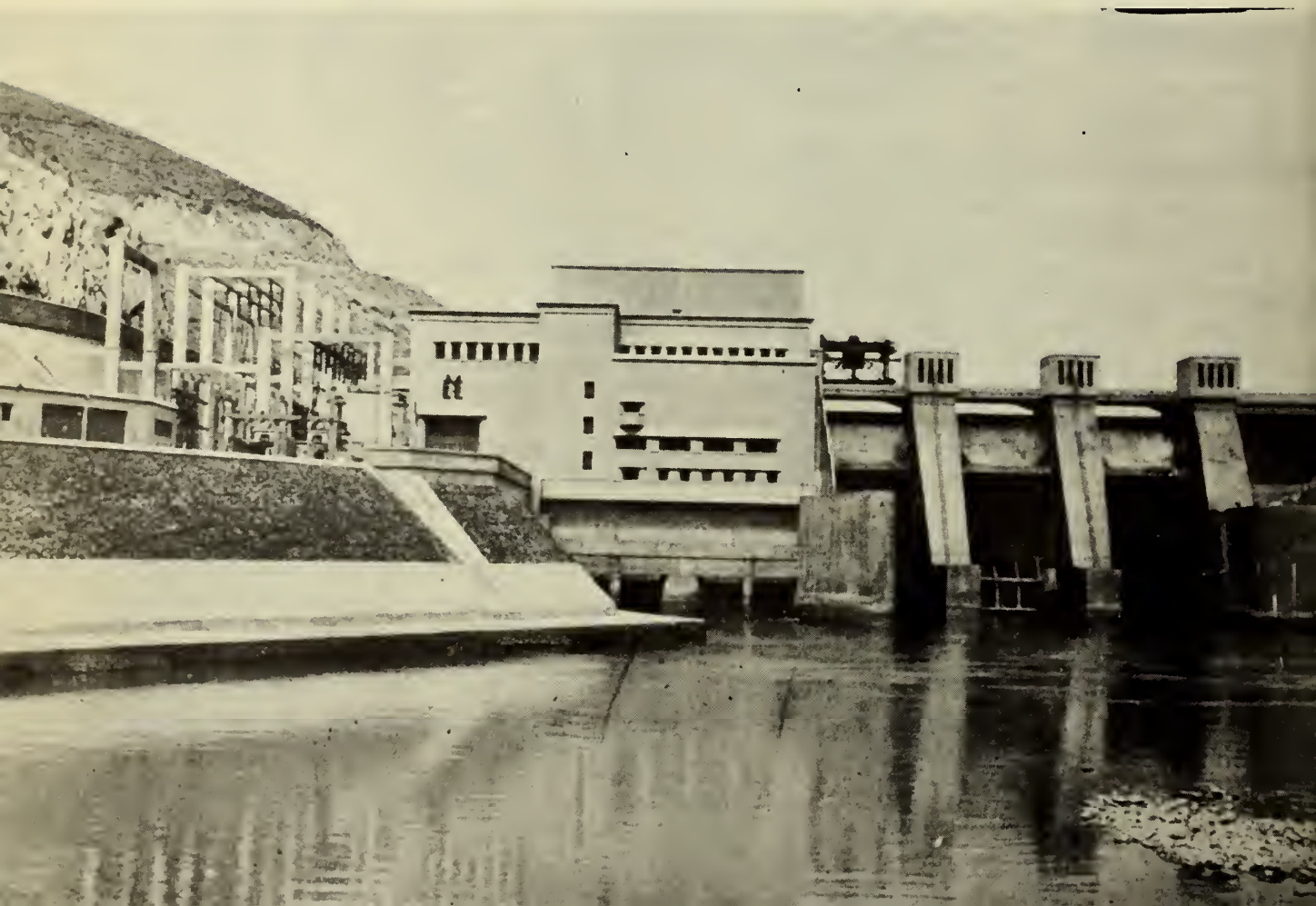
First-class surface mail from the U.S. east coast requires from 2 to 4 weeks to arrive in Morocco and costs 11 cents per ounce and 7 cents for each additional ounce. Airmail requires only 3 to 4 days and costs 15 cents per half ounce.

Offices are generally open from 8 a.m. to noon and from 2.30 p.m. to 6 p.m., Monday through Friday. Though Morocco is an Islamic country, both Government and business are open on Friday. Many business offices are open half day on Saturday. However, all banks are closed on that day. Both Government and private business are closed on Sunday. All offices are completely closed between noon and 2.30 p.m.

Among the holidays celebrated in Morocco are those determined by the Moslem calendar. The holidays determined by the Moslem calendar—those marked with an asterisk—are expected to fall on an anticipated date in the Gregorian calendar, as follows:

New Years' Day
*Aid Seghir, February 2
Feast of the Throne, March 3
Easter Monday
*Aid el Kebir, April 12
Labor Day, May 1
*First Moharrem, May 2
Whitmonday
*Aid El Mouloud, July 11
Feast of the Assumption, August 15
All Saints' Day, November 1
Independence Day, November 18
Christmas Day

***POWER:** This hydroelectric station on the Oum er Rbia River feeds power to the city of Casablanca.*



The metric system of weights and measures is the sole one in use in Morocco.

GOVERNMENT PROCUREMENT

Morocco has no Central Government purchasing office. But Government Bureaus and Ministries publish invitations to bid on goods and services. These invitations are usually published in trade journals, newspapers, and the Government's *Bulletin Officiel.*

Ministries cannot engage in foreign commerce and therefore can only purchase within the country and for local currency. Thus, goods supplied a Ministry from foreign sources must be imported by a local entity, which, in turn, sells to the Ministry.

Government bureaus are considered by law to be corporate entities; they may enter foreign commerce. Usually these bureaus prefer to purchase locally. From a practical point of view, therefore, local representation of the American supplier is essential.

Moroccan firms who are considered by the Government to be qualified and capable are given preference in public works. In some instances, local firms obtain the assistance of large foreign firms in order to qualify professionally.

As a result of training and experience, the Moroccan Government frequently bases its bid specifications on those in use in France. In drawing up bid specifications and subsequent bid considerations, the Government relies on French technical advisers and consultants.

Suppliers are not paid so promptly by the Moroccan Government as by private firms. The local importer of foreign goods may not receive payment for goods until six or more months after their delivery to the Government. Under such conditions, the period and terms of credit offered by the foreign supplier could well be a determining factor to the local importer.

The Government's role in the economy as a major purchaser is becoming increasingly important. Its budget has increased from $387 million in 1956 to $600 million in 1964.

CHAPTER VII

Import Regulations

IMPORT LICENSES are required for virtually all goods coming from non-franc area countries. Exceptions to this rule include samples; personal effects of travelers; material admitted temporarily and intended to be re-exported in the same condition, such as material for displays, demonstrations, and the Casablanca International Fair; spare parts furnished free of charge to replace defective parts; and provisions for U.S. military bases.

IMPORT LICENSING

Import licenses are issued by the Ministry of Commerce, Industry, Mines and Merchant Marine or, in the case of cereal grains, by the Ministry of Agriculture. The Exchange Control Office of the Ministry of Economic Affairs and Finance, Rabat, approves each license before it is issued, thus assuring the availability of foreign exchange. Import licenses are usually valid for 6 months from the time of issue, nontransferable, and valid only for those specific items that are enumerated in the license.

Licenses for commodities from countries outside the franc area are issued on the basis of several import programs:

—The General Import Program—PGI, for nonfranc zone imports not covered by bilateral agreements. Some items included in this program may be imported in whatever quantities are desired while others are subject to quota limitations. The program is normally limited to capital equipment and does not generally include consumer goods.

—The bilateral trade agreements concluded by Morocco with a number of European, Near Eastern, Asian, and African countries.

—The United States AID program which permits the importation of commodities in categories approved by AID and the Moroccan Government.

—Compensation exchanges wherein a percentage of the value of approved exports is allowed for the importation of approved items.

—Equipment, goods, or raw materials imported without payment from Moroccan foreign exchange holdings as in the case of foreign investment equipment.

PORT OF TANGIER, MOROCCO: This once Roman city faces the Atlantic at the west end of the Strait of Gibraltar.

When applying for an import license, Moroccan importers are required to make a deposit that equals 25% of the f.o.b. value of the goods to be imported. Exceptions to this requirement on the deposit are those imports that are to be financed under the AID program and those that are stipulated under payments agreements signed with Spain, the United Arab Republic, Guinea, and most of the Sino-Soviet bloc countries. Still another exception on the deposit requirement is made for imports of certain basic goods, such as cereal grains, dairy products, raw materials, and agricultural equipment.

In order to protect domestic industry, the importation of certain items is either prohibited or strictly controlled by quotas. The list of these goods changes from time to time. Among the products included at present are tires and tubes, most European-sized passenger cars, and various textile products.

EXCHANGE CONTROLS

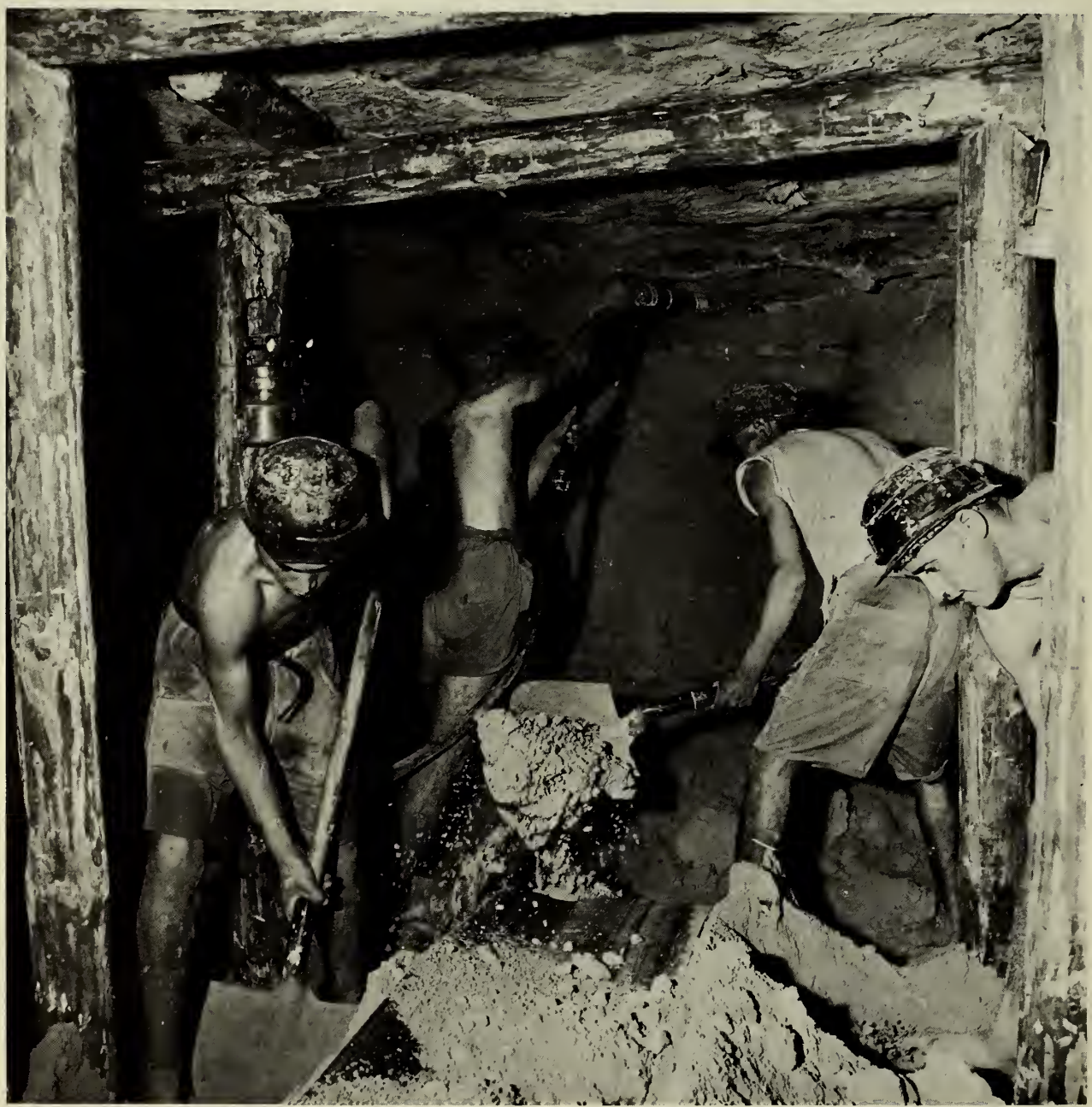
Since the enforcement of Moroccan exchange control is closely linked to the system of import licensing, transfer of funds that are needed to pay for imports is approved by the Exchange Control Office when the import license is issued. The transfer must be made within the period of validity of the import license.

When the U.S. supplier extends credit that calls for a final payment date that falls after the expiration date of the import license, the supplier should assure himself that the importer has obtained prior approval of that extension from the Exchange Control Office.

IMPORT TARIFFS

Moroccan import duties and taxes presently apply equally on goods from all countries, including those from members of the franc area. In general, they range from 21% on most raw materials, semifinished products, and industrial equipment to 97% on luxury goods and goods that would compete with local manufactures. Information on rates for individual items is available from the Africa Division, Bureau of International Commerce, U.S. Department of Commerce, Washington, D. C., 20230.

Virtually all duties are levied on an ad valorem basis. The dutiable value is determined by customs on the basis of both the importer's declaration, i.e., the c.i.f. value, and the cash wholesale value of similar goods on the local market. Import duties and taxes must be paid in cash and in local currency when the shipment is cleared for entry.



***PHOSPHATE MINERS:** Miners excavate a timbered gallery.*

In general, samples that are not otherwise inadmissible may temporarily be entered free of duty on posting a deposit or bond, which is refunded if the sample is re-exported within a year.

Advertising material that has no commercial utility is admitted free of duty. But the material that has a value, e.g., ash trays, cigarette lighters, knives, and key rings, or that is customarily trade in commerce, is subject to the usual duties.

Shipments by mail are subject to the same import and customs regulations as those by other means.

A binding ruling on customs classification cannot be obtained in advance. Upon written request, however, the Director General of Customs, Casablanca, does give an informal, advisory opinion. The present classification is made according to the Brussels Tariff Nomenclature.

More detailed information on Morroccan import licensing, exchange controls, and import tariffs is contained in the U.S. Department of Commerce publication, *Foreign Trade Regulations of Morocco,* Overseas Business Report 63-110, July 1963, which is available for 15 cents from any Field Office or from the Superintendent of Documents, U. S. Government Printing Office, Washington, D. C., 20402.

***LOADING AND CONVEYING:** Man with mechanical loader keeps conveyor full of phosphate rock for the washing plant.*

CHAPTER VIII

Marketing Aids

U. S. PUBLICATIONS AND SERVICES

The U.S. Department of Commerce, both in Washington and through its 42 field offices in principal U.S. cities, assists businessmen who wish to export to Morocco for the first time or to increase their present exports.

Some of the business aids are:

—INTERNATIONAL COMMERCE, a U.S. Department of Commerce weekly, contains in each issue specific trade leads and investment opportunities, gathered through the facilities of the American Foreign Service. Annual subscription, $16. Make remittance payable to the Superintendent of Documents and mail in to the nearest Department Field Office or to the Superintendent of Documents, U.S. Government Printing Office, Washington, D. C., 20402.

—Trade Lists identify firms which handle specific commodities in foreign countries; they cover a wide range of products, services, and trades. These lists, prepared by Foreign Service Officers at U.S. Embassies and Consulates abroad, contain the basic information needed to locate customers, agents, distributors, licensees, and sources of supply overseas. In addition to a listing of firms, each trade list includes a summary of basic trade and industry data, a brief analysis of foreign trade in the commodity, Government regulations affecting trade, and other useful market data. Lists of importers and dealers indicate the relative size of each firm, method of operation, products handled, territory covered, and sales force. Lists of exporters and manufacturers indicate the relative size or production capacity of each firm and name the products handled. Trade Lists may be obtained for $1 per list from the Commercial Intelligence Division, Bureau of International Commerce, U.S. Department of Commerce, Washington, D. C., 20230, or from any Field Office.

—World Trade Directory Reports—WTD's supplement the Trade Lists by furnishing business particulars on individual foreign firms. Prepared by Foreign Service Officers and representing a consensus of reliable sources of information, WTD's supply the detailed information needed to determine the competence and general reliability of specific foreign firms. These

***RABAT OFFICE BUILDING:** Bright sunshine gleams on modern building in Rabat, Morocco, on the Atlantic.* →

reports, again, are available for $1 each from the Commercial Intelligence Division or from any Field Office. The complete name and address of the foreign firms should be given when ordering WTD's.

—Trade Contact Surveys provide a specialized, "on-the-scene" investigation designed to find in a particular country several foreign firms that meet the U.S. businessman's individual requirements and that express an interest in the representation he offers. These surveys, which cost $50 each, are conducted by Foreign Service Officers abroad on behalf of any qualified U.S. firm. Further information and necessary application forms are available from any Field Office or from the Commercial Intelligence Division.

—Overseas Business Reports, formerly, World Trade Information Service, furnish a wide range of economic, commercial, and financial information about specific foreign countries. Current reports in this series on Morocco, which may be obtained for 15 cents each from the Superintendent of Documents or from Field Offices, are:

—*Basic Data on the Economy of Morocco.* OBR 63-1, 20 pp. February 1963.

—*Establishing a Business in Morocco.* Part 1 No. 62-4, 15 pp. February 1962.

—*Foreign Trade Regulations of Morocco.* OBR 63-110, 7 pp. July 1963.

—*Investment Law of Morocco.* Part 1 No. 61-59, 4 pp. August 1961. Also its supplement, Part 1 No. 61-78, 3 pp. December 1961.

—*Living Conditions in Morocco.* OBR 63-89, 7 pp. April 1963.

—*Preparing Shipments to Morocco.* OBR 63-45, February 1963.

A complete checklist of all OBR's and other international business publications of the Department of Commerce is available on request from any Field Office or from the Office of Publications and Information for Domestic and International Business. Publications Division, Washington, D. C., 20230.

Foreign trade specialists are available for consultation in all Commerce Department Field Offices. Businessmen are invited to call, write, or visit a Field Office and there to contact these specialists for expert advice on all phases of international commerce.

Trade information may also be obtained directly from the Department of Commerce in Washington, where the Africa Division, Office of International Regional Economics, Bureau of International Commerce, will supply available commercial or economic data on request concerning Morocco or any other African country.

Many service organizations, such as banks, insurance brokers, transportation agencies, freight forwarders, advertising agencies, and market research organizations, offer specialized services for the exporter. Use of these agencies obviates the necessity for maintaining comparable operations.

TRADE ASSOCIATIONS

The more than 100 trade associations in Morocco cover most sectors of the economy. Practically all business firms, large and small, belong to an associaciation. The name and address of the association are included in the Trade Lists.

The Confédération Générale Economique Marocaine —CGEM, whose membership is principally non-Moroccan, is the largest of the trade associations and acts as a sort of federation of industry in Morocco. The CGEM is located in Casablanca.

There is no American Chamber of Commerce in Morocco. However, there are several foreign chambers of commerce, notably: French, Italian, Belgium-Luxembourg, Spanish, and British. In addition, there are two mixed chambers, i.e., Morocco-Dutch and Morocco-Czech.

Moroccan businessmen are represented by 14 chambers of commerce and industry in the more important cities throughout the country. The chambers are elective and operate as quasi-governmental organizations. Since foreign commerce is concentrated in the hands of non-Moroccans, although not limited to them, these chambers have affected the operation of foreign trade but very little. However, Moroccans are now playing a larger role in commerce, and the chambers may become more effective.

FAIRS

The largest fair in Morocco—the Casablanca International Fair—is held every spring in Casablanca and draws 600,000 visitors. In 1964, some 25 nations participated, including the United States, France, West Germany, Great Britain, Communist China, Italy, Spain, and Belgium. The United States also mounted major exhibits in 1957-1960 and 1962. Foreign exchange is provided for the importation of goods shown at the fair. It is, therefore, possible for the exhibitor to obtain a foreign exchange allocations which might otherwise be unavailable to him. American firms desiring to participate in official U.S. exhibits at this fair

should contact the Office of International Trade Promotion, U.S. Department of Commerce, Washington, D. C., 20230.

A number of other cities have fairs, usually during the spring and summer. The most important of these are held in Marrakech, Fès, Meknès, and Kenitra.

OFFICIAL REPRESENTATION

Morocco's representation in the United States consists of the Embassy at 1601 Twenty-First Street, N.W., Washington, D. C., 20009, and the Consulate General at 342 Madison Avenue, New York, N. Y., 10017. The Moroccan Trade Information Center is located at 10 East Fortieth Street, New York, N. Y., 10016.

The American Embassy is located at 6 Avenue de Marrakech in Rabat; a branch office is maintained in Tangier at Chemin des Amoureux. The Consulate General in Casablanca, where the Commercial Officer has his office, is located at 1 Place de la Fraternité. The Consulate General in Casablanca publishes a periodic commercial newsletter in French, which is sent to almost 1,000 leading business firms throughout the country. Announcements of firms seeking sales or representation in Morocco are included in the newsletter when the products or services have, in the opinion of the Consulate General, a potential market in Morocco.

If given notice of at least 1 month, whenever possible, the Consulate General will try to obtain, through individual personal contact, the names of potentially interested firms for follow-up by representatives of U.S. firms during visits to Casablanca. Firms wishing to avail themselves of this service should give the Consulate General full particulars, preferably in French, on the products they wish to market in Morocco as well as their specific requirements for an agent or distributor. If there does not appear to be a potential market, the Consulate General will so inform the firm and give his reasons.

ADVERTISING

Advertising is accepted by both the daily and the weekly press. French-language papers have the largest circulation. The leading daily papers, all published in Casablanca, are Le Petit Marocain, La Vigie, La Nation, and Maroc Informations, an economic newspaper. Espana, published in Spanish in Tangier, circulates largely in northern Morocco and southern Spain. Arabic dailies generally have but a small circulation. Weekly papers in both French and Arabic also generally have very small circulations. La Vie Economique, a weekly dealing with economic developments, is widely read in commercial circles.

Local movie houses show advertising, both slides and short films. The ads are prepared and distributed by Agence Havas Marocaine, 8 Rue Colbert, Casablanca, and Universal Publicité, Immeuble des Imprimeries Réunies, Rue Mohamed Smiha, Casablanca. The radio and television network does not accept advertising.

Although there are advertising agencies in Morocco, they are small-scale operations. Chérifienne d'Editions et de Publicité, 71 Rue Allal Ben Abdallah, Casablanca is associated with an international group, which includes an American agency.

APPENDIX

A. Notes to the Business Traveler

HOTEL ACCOMMODATIONS

There are a number of first-class hotels in the major cities of Morocco. Rooms are generally available in the hotels, but it is advisable to make reservations. In Casablanca, single rooms with bath cost between $10 and $15 per day, including tax and services. Double rooms cost between $12.50 and $17.50. Rates are generally slightly lower in other cities. A hotel is now under construction in Rabat and will probably be completed in 1965.

FOOD AND CLOTHING

The major cities all have a variety of restaurants, most of which serve French food. Several good Moroccan restaurants can be found as well as some serving Indochinese and other dishes. In Casablanca, a continental breakfast costs $1, including taxes and service; a dinner, $3 and more. But, in first-class hotels, a dinner costs between $5 and $6. Prices are comparable elsewhere in Morocco.

Morocco has a generally temperate climate. Summer clothes that are normal in America can be worn from May through October. For the rest of the year, wool business suits and a light topcoat are recommended. Laundry services provided by hotels are excellent and are performed in less than 24 hours. Costs approximate those of first-class hotels in the United States. Dry cleaning service is also available, but not in 24 hours.

LOCAL TRANSPORTATION

Morocco's internal transportation system is well developed. Most of the major cities are connected by rail. Buses also run on regular schedules and provide adequate transportation. Internal air service is at present available between Casablanca and Marrakech, Rabat, Agadir, and Tangier.

Taxis are readily available in all the centers. Normally, there are two types, the grand, or the American sedan, and the petit, or small European car. In Casablanca, taxis are metered and cost 9 cents plus 20 cents per mile for the grand taxi, and 8 cents plus 10 cents per mile for the petit taxi. From 8 p.m. in the winter and 9 p.m. in the summer to 6 a.m. these rates are increased by 50 percent. Tips average 15% of the fare. In Rabat, taxis are not metered; charges are made there on a zone basis and average about the same as in Casablanca.

Automobiles may be rented in all the major cities at rates which are comparable to those in the United States. Two American car rental firms have representatives throughout Morocco. The road system in Morocco is generally in good conditions, and driving times are comparable to those over similar distances on two-lane roads in the United States. Premium gasoline costs about 60 cents a gallon. Service stations are located in all the towns, but competent mechanics can be difficult to find outside the major cities.

PASSPORTS AND VISAS

Citizens of the United States on a visit to Morocco need have only a valid U.S. passport. A visa is not required. No vaccination or inoculation certificates are needed. Immunization against smallpox, typhoid, and typhus is recommended. Cars owned by temporary visitors may be admitted freely on presentation of the registration documents from the country of origin. After 6 months, the car is subject to normal customs formalities.

Persons proposing to establish residence in Morocco are subject to more stringent regulations. They must register with the police and must have any work contracts approved by the Government.

B. Bibliography

Here is a select list of reference on Morocco in French.

None of these publications are available in English.

GENERAL ECONOMY

Annuaire Maritime, Commercial et Industriel du Maroc. 292 pages. Published annually by Agence Public-Maghreb, 70, Rue Ibn Batouta, Casablanca, Morocco.

Annuaire Marocain. Published annually by Imprimeries Reunies, Casablanca.

Annuaire Statistique de la Zone Francaise de Maroc. Provides information on climate, demography, agriculture, commerce, industry, land tenure, finance, consumption, and labor. Published annually by former French Protectorate's Statistical Service, Casablanca.

Bottin du Maroc. Societe Didot-Bottin, 195, bis Boulevard Saint Germain, Paris 7, France.

Bulletin Economique et Social du Maroc. Published by Societe d'Etudes Economiques, Sociales et Statistiques, Recette Postale, Rabat-Chellah, Morocco.

Bulletin Mensuel de Statistique. A monthly report printed in Rabat by the Moroccan Government since September 1957.

Statistiques de Mouvement Commercial et Maritime du Maroc. Published annually by the Ministry of Commerce and Industry.

Geographie du Maroc. Obtained at Librairie Delagrave, 15 Rue Soufflot, Paris Vie, France.

ECONOMIC DEVELOPMENT

La Situation Economique du Maroc en 1960. Published by the Ministry of the National Economy, Rabat, 1960.

Tableaux Economiques du Maroc, 1915-1959. Contains valuable maps as well as statistics. Published by the Ministry of the National Economy, Rabat, 1960.

Plan Quinquennal 1960-1964. Published by the Ministry of the National Economy.

AGRICULTURE

Perspectives de l'Agriculture Marocaine. Published in 1949 by Institut des Hautes Etudes Marocaines, Rabat.

FINANCE

Bulletin de Documentation Financiers. Contains information on financial regulations and taxation as well as economic statistics. Published by the Moroccan Government's Ministry of Finance, Rabat.

Bulletin Officiel. Published weekly by Imprimerie Officille, Avenue Jean-Mermoz, Rabat.

Etudes et Statistiques. A monthly publication by the Bank of Morocco, Rabat.

Finance Publique du Maroc. Obtained through M. Champion, Ministre de l'Economie Nationale et des Finances, Rabat.

FOREIGN TRADE

Bulletin Mensuel d'Information. Published monthly by Office Cherifien de Controle et d'Exportation, Casablanca.

Note de Documentation. Contains official currency allocations for imports. Published monthly by the Ministry of Commerce and Industry, Rabat.

LABOR AND SOCIAL

Le Maroc and Travail. An analysis of Morocco's social structure with emphasis on distribution of labor. Published by the Ministry of Labor and Social Questions, Rabat, 1960.

Naissance du Proletariat Marocain. Published by Peyronnet & Co., 33 Rue Vivienne, Paris.

Liste des Associations Professionelles. Printed annually by Chamber of Commerce et d'Industrie de Casablanca.

Repertoire des Etablissements Industriels. Printed by Direction de l'Industrie, Bureau de la Documentation et du Fichier Industriel, Rabat, Morocco.

MINES

Mines et Geologie. Published by Direction of Mines and Geology, Rabat, 1963.

Etat des Statistiques de Productions, des Exportations et des Ventes Locales Minieres. Published monthly by the Direction of Mines and Geology, Rabat.

TABLES

Table 1.—National Income, 1952, 1956, 1960, and 1963

Year	Gross national product [millions of dollars]	Gross domestic product [millions of dollars]	Per capita income [dollars]
1952	1,681	1,546	180
1956[1]	2,072	1,831	202
1960	1,850	1,640	159
1963	2,125	1,893	162

[1] Former Southern Zone only. Southern Zone referes to the section of Morocco that previous to 1956 was a French protectorate and was known as French Morocco.

Source: Central Statistical Service, *Statistiques du Mouvement Commercial et Maritime du Maroc*, Rabat.

Note: The data in table 1 and all the other tables with dollar figures for 1956 and for 1960-63 are based on the following conversion: 1956, $1 equals 350 Moroccan francs; 1960-63, $1 equals 5.01 dirhams.

Gross national product—GNP represents the total production of goods and services in Morocco plus imports minus exports.

Gross domestic product—GDP represents the total production of goods and services in Morocco without regard to foreign trade.

HOW THE JETTY DELURE WAS BUILT: A 100-ton crane on that Casablanca harbor jetty positioned the concrete blocks.

Table 2.—Moroccan Foreign Trade, First 15 Countries,[1] 1956, 1960, 1963
[Value in millions of dollars]

Trading partner	*1956*[2]		*1960*		*1963*	
	Value	*Percent of total*	*Value*	*Percent of total*	*Value*	*Percent of total*
	Imports					
France	213.1	48.0	204.8	49.1	190.4	42.4
United States	39.1	8.8	37.6	9.0	44.7	10.0
Cuba	14.3	3.2	19.8	4.8	27.1	6.0
West Germany	21.1	4.8	19.0	4.6	25.8	5.8
Italy	12.9	2.9	14.0	3.4	19.6	4.4
United Kingdom	13.7	3.1	14.0	3.3	14.2	3.2
Netherlands	14.3	3.2	9.0	2.0	13.8	3.1
Belgium-Luxembourgh	12.3	2.7	7.8	1.9	10.4	2.3
Sweden	6.3	1.4	5.6	1.3	8.8	2.0
U.S.S.R.	0.1	Nil	6.6	1.6	7.2	1.6
Communist China	19.7	4.5	7.2	1.7	6.9	1.5
Spain	1.3	0.3	7.7	1.9	6.8	1.5
Poland	2.6	0.6	3.4	0.8	6.5	1.4
Czechoslovakia	1.6	0.4	2.2	0.6	6.0	1.3
Algeria	9.2	2.1	4.8	1.1	4.0	0.9
All others	62.8	14.0	53.8	12.9	56.5	12.6
Total	444.4	100	417.3	100	448.7	100
	Exports					
France	178.6	52.7	144.0	40.2	159.5	41.0
West Germany	23.1	6.8	32.8	9.1	32.3	8.3
Spain	5.9	1.7	12.4	3.5	22.7	5.8
United Kingdom	18.7	5.5	23.6	6.6	19.7	5.1
Italy	20.6	6.1	17.6	4.9	17.1	4.4
Belgium-Luxembourgh	8.6	2.5	10.8	3.0	13.8	3.6
Netherlands	9.1	2.7	9.0	2.5	12.7	3.3
Algeria	13.7	4.1	27.2	7.6	11.8	3.0
Cuba	0.3	0.1	(4)	Nil	9.6	2.5
U.S.S.R.	0.2	Nil	3.6	1.0	8.2	2.1
Poland	3.5	1.0	3.0	0.8	6.5	1.7
Communist China	0	0	6.6	1.9	6.3	1.6
Czechoslovakia	0.3	0.1	1.8	0.5	6.0	1.5
United States	8.8	2.6	10.1	2.8	5.7	1.5
Sweden	4.3	1.3	4.0	1.1	4.5	1.2
All others	43.4	12.8	52.1	14.5	52.2	13.4
Total	339.1	100	358.6	100	388.6	100

[1] Countries are ranked according to their position in 1963.

Table 3.—Moroccan Foreign Trade by Major Trading Areas, 1956, 1960-63

[Millions of dollars]

Trading area	1956		1960		1961		1962		1963	
	Value	Percent of total	Value	Percent of total	Value	Percent of total	Value	Percent of total	Value	Percent of total
	Imports									
Common Market	273.7	61.6	254.8	61.0	282.1	62.5	241.5	56.1	260.0	57.9
Sino-Soviet bloc[1]	38.8	8.7	42.8	10.3	34.2	7.6	51.5	12.0	60.2	13.4
United States	39.1	8.8	37.6	9.0	47.3	10.5	58.2	13.5	44.7	10.0
United Kingdom	13.7	3.1	14.0	3.3	13.6	3.0	12.9	3.0	14.2	3.2
Spain	1.3	0.3	7.7	1.9	6.2	1.4	6.1	1.4	6.8	1.5
Others	77.8	17.5	60.4	14.5	68.1	15.0	59.9	14.0	62.8	14.0
Imports, total	444.4	100	417.3	100	451.5	100	430.1	100	448.7	100
	Exports									
Common Market	240.0	70.8	214.3	59.7	201.5	58.2	206.6	58.6	235.5	60.6
Sino-Soviet bloc[1]	4.9	1.4	16.2	4.5	20.7	6.0	29.7	8.4	41.1	10.6
United States	8.8	2.6	10.1	2.8	10.1	2.9	9.7	2.7	5.7	1.5
United Kingdom	18.7	5.5	23.6	6.6	24.4	7.0	22.2	6.3	19.7	5.1
Spain	5.9	1.7	12.4	3.5	16.9	4.9	13.9	4.0	22.7	5.8
Others	60.8	18.0	82.0	22.9	72.8	21.0	70.4	20.0	63.9	16.4
Exports, total	339.1	100	358.6	100	346.4	100	352.5	100	388.6	100

[1] Cuba, though not in the bloc in 1956, is so included for comparison with the years 1960-63.

Table 4.—Trade Balance by Major Trading Area, 1956, 1960-63

[Millions of dollars]

Trading area	1956	1960	1961	1962	1963
Common Market	−33.7	−40.5	−80.6	−34.9	−24.5
Sino-Soviet block[1]	−33.9	−26.6	−13.5	−21.8	−19.1
United States	−30.3	−27.5	−37.2	−48.5	−39.0
United Kingdom	+5.0	+9.6	+10.8	+9.3	+5.5
Spain	+4.6	+4.7	+10.7	+7.8	+15.9
Other countries	−17.0	+21.6	+4.7	+10.5	+1.1
Total	−105.3	−58.7	−105.1	−77.6	−60.1

[1] Cuba though not in the Soviet bloc in 1956, is included for comparison with the years 1960-63.

Table 5.—Balance of Payments, 1956, 1960-62, and Estimated 1963

[Millions of dollars]

Item	1956	1960	1961	1962	1963[1]
Goods and services	−141	− 33	− 61	− 64	− 45.8
Exports, f.o.b.	+343	+382	+363	+353	+387.0
Imports, f.o.b.	−414	−386	−420	−405	−435.0
Services	− 70	− 29	− 4	− 12	+ 2.2
Private capital	+ 19	− 30	+ 1	−	− 39.2
Government operations	+295	+138	− 56	+ 65	+ 55.2
Errors and omissions	−316	− 2	− 40	− 21	− 13.6
Changes in foreign exchange holdings	−143	+ 73	− 44	− 20	− 43.4

[1] Unofficial estimate. Official figures for 1963 are not available.

Table 6.—Imports and Exports by Commodity Group, by Percent Change Between 1956 and 1963

Commodity group	Imports	Exports
Foodstuffs	−17.8	+15.6
Energy, petroleum	−44.7	−42.3
Raw materials		
Animal and vegetable origin	+68.8	+22.1
Minerals	+242.9	+24.6
Semifinished products	+32.5	+30.0
Finished products		
Agricultural equipment	+25.0	(1)
Industrial equipment	+14.5	−14.3
Consumer products	−13.4	+4.0
Total	+1.0	+14.6

[1] Exports were less than $50,000 in 1963.

Table 7.—Moroccan Imports from the United States of Agricultural and Nonagricultural Products, 1956, 1960-63

Item	1956[1]	1960	1961	1962	1963
Imports, total.....millions of dollars	444.4	417.3	451.5	430.1	448.7
Imports from United States.....do	39.1	37.6	47.3	58.2	44.7
Imports from United States.....percent of total	8.8	9.0	10.5	13.5	10.0
Imports from United States of agricultural products.....millions of dollars	6.2	17.1	30.3	38.3	23.1
Imports from United States of agricultural products.....percent of total imports from United States	15.9	45.5	64.1	65.8	51.7
Imports from United States of nonagricultural products.....millions of dollars	32.9	20.5	17.0	19.9	21.6
Imports from United States of nonagricultural products.....percent of total imports from United States	84.1	54.5	35.9	34.2	48.3

Table 8.—Moroccan Imports of Selected Commodities, 1956 and 1960-63

[Total imports in millions of dollars]

Commodity	1956		1960		1961		1962		1963	
	Total imports	*Imports from US as percent*	*Total imports*	*Imports from US as percent*	*Total imports*	*Imports from US as percent*	*Total imports*	*Imports from US as percent*	*Total imports*	*Imports from US as percent*
Total	444.4	8.8	417.3	9.0	451.5	10.5	430.1	13.5	448.7	10.0
Foodstuffs, beverages, tobacco	113.1	18.7	89.0	7.9	112.2	18.9	105.7	27.1	93.0	10.4
Fresh meat	.8	.3	.1	—	.1	—	(1)	—	(1)	—
Milk	3.7	.5	3.3	7.1	2.6	7.3	3.4	12.5	3.9	2.8
Butter	3.4	1.0	2.8	1.9	2.5	3.2	2.7	4.2	3.9	4.0
Cheese	4.2	1.5	2.4	—	2.0	—	1.5	—	2.0	8.3
Seed potatoes	.3	—	1.1	—	1.4	—	2.5	—	1.9	—
Other potatoes	1.8	—	.8	—	.9	—	.6	—	.5	—
Coffee	5.3	(2)	4.3	—	2.9	.1	3.6	—	5.7	—
Tea	18.1	—	10.0	—	11.4	—	11.0	—	10.1	—
Durum wheat	—	—	.1	99.8	.8	100.0	1.3	99.8	.3	5.7
Hard wheat	1.7	46.9	11.3	27.5	22.8	63.4	21.0	93.6	7.3	50.6
Corn	(1)	(3)	(1)	—	—	—	(1)	(3)	(1)	(3)
Rice	(1)	(3)	.5	96.3	(1)	—	(1)	—	(1)	(3)
Wheat flour	(1)	(3)	2.2	60.0	1.0	89.4	1.5	100.0	3.8	100.0
Tobacco	2.2	33.0	2.9	37.0	4.1	24.1	3.0	31.6	4.0	3.1
Sugar	42.0	1.0	35.8	.3	36.9	.1	39.5	.1	38.5	.1
Cocoa	.4	—	.3	—	.2	—	.3	—	.2	—
Wine in barrels	.1	—	.1	—	.1	—	(1)	—	(1)	—
Wines, liquors, etc	1.9	2.0	1.0	.1	1.3	—	.7	.3	1.1	.1
Miscellaneous	25.1	15.3	10.0	4.8	21.0	15.8	13.1	35.5	9.7	4.0
Energy, lubricants	29.1	2.7	30.6	1.8	31.7	1.7	17.2	3.3	16.1	1.8
Coal	1.9	13.1	1.2	—	1.2	—	1.0	.1	1.3	.4
Gasoline	16.3	3.1	9.1	2.4	8.7	2.5	3.7	1.8	.5	.5
Kerosene	2.1	.1	1.9	1.6	2.0	3.3	.8	(2)	.5	(2)
Gas and fuel oils	7.7	(2)	10.2	(2)	10.5	(2)	2.9	(2)	.4	.1
Lubricating oils	2.5	11.1	3.2	7.1	3.4	5.2	3.3	6.9	3.4	3.4
Paraffin	.9	1.5	.8	4.4	.9	6.5	1.2	21.4	.8	19.1
Bituminus products	.1	84.4	.8	—	.9	(2)	.9	—	1.0	.9
Miscellaneous	1.2	.1	3.3	.1	4.2	.4	3.4	.5	8.3	.2
Animal or vegetable origin products	29.5	16.9	37.1	3.3	41.5	24.7	44.0	24.3	49.8	31.7
Peanuts	2.3	—	2.0	—	2.5	—	3.9	—	1.9	—
Oleaginous seeds and beans	(4)	(4)	1.1	100.0	1.2	98.2	1.6	99.2	.4	91.5
Other seeds	1.2	.2	.4	—	1.2	28.1	.1	—	.2	—
Peanut oil	1.7	—	1.1	15.5	.3	17.0	1.1	—	(1)	—
Sawed raw wood	8.1	.1	8.0	—	10.7	.1	10.7	—	13.2	.1
Wool, hair	.5	—	.8	—	.7	—	1.0	—	1.2	—
Drill and rags	.1	.3	.1	38.6	.1	29.2	.2	42.8	.3	21.5
Miscellaneous	19.7	24.4	23.7	46.8	24.8	35.1	25.3	35.5	32.7	47.0

Table 8.—Moroccan Imports of Selected Commodities, 1956 and 1960-63—Continued

[Total imports in millions of dollars]

Commodity	1956		1960		1961		1962		1963	
	Total imports	Imports from US as percent	Total imports	Imports from US as percent	Total imports	Imports from US as percent	Total imports	Imports from US as percent	Total imports	Imports from US as percent
Mineral origin products	1.5	13.2	2.4	8.2	2.5	4.9	3.1	12.9	3.5	6.3
Natural sulfur	.3	56.8	.3	18.2	.1	—	.2	—	.1	—
Miscellaneous	1.2	3.6	2.1	6.7	2.4	10.2	2.9	13.9	3.3	13.1
Semifinished products	68.9	6.1	74.9	4.7	78.7	5.1	80.1	4.6	91.3	3.9
Binders and hydrous cement	.5	—	.1	—	.1	—	.2	—	.2	—
Chemicals	5.8	3.8	5.9	1.9	6.1	3.0	6.7	2.2	7.5	2.7
Fertilizers	1.9	—	3.6	—	4.0	.1	4.8	.1	4.8	.1
Raw paper products	5.5	.2	6.2	1.1	6.2	.6	6.4	.8	8.0	1.9
Industrial lumber	.7	(2)	.5	.1	.4	—	.3	1.4	.3	1.2
Synthetic yarn	(4)	(4)	4.3	—	3.9	—	5.0	—	6.5	(2)
Cotton yarn	.7	1.3	1.7	—	1.3	.2	2.1	.7	2.0	.1
Ceramic products	.5	—	.3	.2	.5	—	.7	.3	.6	.1
Unfinished and unworked glass	1.3	(2)	.9	1.2	.7	.9	.8	.9	1.0	.8
Raw silver, platinum	(4)	(4)	(1)	—	(1)	—	(1)	—	(1)	—
Ferrous tubes, pipes, castings	2.6	(2)	2.3	3.8	3.0	1.8	2.8	4.3	2.4	1.3
Metallic frameworks	(4)	(4)	.6	6.5	.9	2.3	.5	5.4	.6	7.0
Metallic wire, and cable except electrical	.6	.8	.5	7.2	.5	1.3	.5	2.5	.4	2.8
Hardware except for home use	1.0	1.4	1.2	8.1	1.4	6.6	1.6	5.8	1.7	7.0
Plates, sheets	6.3	—	8.8	.3	10.1	(2)	9.1	(2)	9.9	(2)
Wire, bars, sections	7.4	(2)	7.8	.1	9.3	.2	9.6	(2)	10.4	(2)
Copper	1.6	2.5	1.9	.6	1.5	.4	1.7	.5	2.4	.3
Electrical wire and cable	2.0	.6	1.0	.9	.8	.5	.9	1.3	1.0	1.4
Miscellaneous	24.7	4.2	27.3	11.2	27.9	12.7	26.4	12.2	31.6	9.3
Finished agricultural equipment	4.4	7.2	3.3	22.0	2.1	22.3	4.1	18.0	5.5	16.8
Agricultural machines	2.1	63.0	1.3	39.7	.8	19.7	1.5	23.9	2.5	14.7
Agricultural tractors	1.3	46.1	1.4	14.1	.7	42.3	2.0	18.5	2.0	24.8
Miscellaneous	1.1	10.2	.6	2.0	.6	2.6	.6	1.4	.9	5.3
Finished industrial products	59.9	42.6	53.0	11.0	60.0	9.8	55.0	11.6	68.6	9.5
Solid and pneumatic industrial tires	5.6	9.4	5.4	5.2	4.4	4.2	4.1	3.5	2.3	7.7
Professional tools	.8	1.9	.7	5.4	.7	2.8	.7	3.0	.9	3.8
Jute sacks	2.4	.1	1.2	2.8	1.4	8.0	1.5	13.7	1.4	1.2
Railroad machinery	1.1	—	.2	.1	.3	—	1.3	—	1.0	—
Tanks, metal drums	1.2	.9	.4	1.3	.5	1.0	.2	2.7	.2	.5
Machine tools	.9	6.7	1.8	17.2	2.4	7.9	2.0	8.8	2.3	7.1
Boilers	.4	3.5	.1	2.5	.4	.7	.2	17.9	.2	10.8
Machinery spare parts	1.4	35.8	.3	7.3	.4	8.0	.3	7.6	.5	7.9
Piston engines	4.9	35.7	5.9	2.5	3.8	19.6	6.1	17.3	7.2	11.8
Extractive equipment	1.5	83.0	2.3	22.7	1.8	60.2	.9	50.1	1.5	49.7
Pumps, compressors	1.7	19.6	2.0	12.8	2.4	10.7	2.3	18.6	2.2	13.0
Food industry machinery	1.1	1.6	.8	22.8	.7	3.4	.6	1.9	.9	11.4
Miscellaneous machinery and apparatus	3.2	10.1	3.6	12.4	5.4	3.0	4.2	5.6	5.7	7.5
Crushing machinery	.9	21.2	1.5	14.7	1.3	14.8	1.3	15.6	1.2	7.7
Lifting and handling equipment	1.9	9.6	1.1	6.9	1.7	2.1	1.2	5.7	1.7	8.9
Textile machinery	.6	16.1	1.7	5.4	2.4	.1	2.8	.7	4.3	(2)
Electric motors	1.7	5.9	1.0	6.4	1.2	4.7	1.5	5.4	2.0	39.0
Electrical switches, circuit breakers	1.0	1.9	.6	2.1	.7	1.9	.8	2.4	.8	2.0
Railroad rolling stock	1.3	3.1	.6	.4	3.0	.4	.8	.6	1.9	(2)
Tractors other than agricultural	.1	32.5	.3	14.4	.2	50.2	.3	72.7	.9	72.0
Industrial vehicles	7.1	46.5	2.2	3.8	2.4	8.0	2.2	7.3	4.4	1.6
Industrial vehicle spare parts	1.6	59.9	.7	1.8	.4	4.6	.2	10.4	.5	4.0
Boats	2.1	—	.1	—	1.2	—	1.1	—	.3	—
Miscellaneous	15.5	16.0	18.3	19.8	21.0	11.7	18.3	15.2	24.5	10.4
Finished consumer products	138.1	42.0	113.5	4.7	118.8	3.9	119.5	5.9	119.6	6.3
Medicines and drugs	7.4	1.3	9.1	.6	10.7	.7	11.8	.3	12.1	.2
Toilet articles and perfumes	2.1	.5	1.3	2.0	1.2	.1	1.0	—	.9	—
Tires except for industrial vehicles	.9	.1	.7	.2	.7	.9	.7	.9	.7	.1
Finished paper	3.6	.7	4.3	.7	5.3	.7	6.7	.6	4.9	.6
Printed fabrics except cotton	1.9	3.2	2.5	.3	2.5	1.3	2.9	3.1	2.3	6.4

Table 8.—Moroccan Imports of Selected Commodities, 1956 and 1960-63—Continued

[Total imports in millions of dollars]

Commodity	1956		1960		1961		1962		1963	
	Total imports	*Imports from US as percent*	*Total imports*	*Imports from US as percent*	*Total imports*	*Imports from US as percent*	*Total imports*	*Imports from US as percent*	*Total imports*	*Imports from US as percent*
Finished consumer products, continued										
Synthetic and artificial fiber fabrics	14.5	10.6	14.6	2.3	14.8	3.4	13.3	6.7	14.5	3.6
Wool and hair fabrics	3.3	(2)	2.9	(2)	2.2	.1	2.3	.1	2.5	.1
Cotton fabrics	11.8	5.8	10.6	16.4	10.8	15.5	10.1	22.3	10.4	19.4
Printed cotton fabrics	1.1	1.1	3.1	10.0	2.3	6.3	1.7	11.9	3.4	7.7
Knitted articles	5.5	.7	2.8	1.3	2.3	.1	2.0	.6	1.3	.1
Wearing apparel	6.1	5.8	3.9	2.0	4.8	1.8	5.4	.4	3.4	3.0
Household and furnishing linens	1.9	2.1	.6	.6	1.0	.4	1.0	.2	.8	(3)
Shoes	3.9	2.4	1.1	—	2.4	.2	2.8	.1	1.1	.6
Tableware	1.0	(3)	.8	.4	.8	.1	.8	(2)	.9	(2)
Glassware and finished glass products	1.2	2.8	.9	.9	.8	1.0	.8	1.6	1.2	.3
Money, silver	(4)	(4)	1.7	—	2.5	—	.8	—	.2	—
Household hardware	2.4	.5	1.8	1.6	2.0	.8	2.1	.6	2.4	.5
Household refrigerators	2.0	51.9	1.1	8.6	1.1	5.3	.8	5.1	1.3	9.6
Radios	5.1	1.2	1.2	.7	1.3	.1	1.9	.2	2.9	.1
Passenger automobiles	19.7	16.2	18.1	6.5	18.1	3.7	14.5	12.2	14.8	15.3
Passenger automobile spare parts	3.7	38.2	4.6	12.8	4.1	12.1	6.4	9.9	8.0	11.2
Bicycles and motorcycles	2.4	.7	1.7	.6	1.8	1.1	2.1	2.1	2.9	(3)
Miscellaneous	34.3	7.7	24.1	3.3	25.4	3.3	25.5	3.9	26.8	4.4
Industrial gold	.2	—	13.5	(3)	4.0	—	1.4	—	1.4	—

[1] Less than $50,000. [2] Less than .05 percent. [3] Not determined because less than $50,000. [4] Data are not available.

Source: Ministry of Commerce, *Notes de Documentation*, Rahat. Note: Totals do not necessarily agree with column total due to rounding.

Table 9.—Value of Selected Agricultural Product Imports, 1956, 1960-63

[Millions of dollars]

Commodity	1956	1960	1961	1962	1963
Hard wheat	1.7	11.3	22.8	21.0	7.3
Soybeans	(1)	(2)	1.1	1.6	.3
Soybean oil, unrefined	4.6	4.2	3.8	4.9	7.7
Tallow, edible/inedible	.7	1.7	1.6	1.9	1.7
Leaf tobacco	1.7	1.2	2.7	2.0	2.6
Raw cotton	1.5	1.9	1.8	2.7	2.3

[1] Less than $50,000.
[2] Data are not available.

Table 10.—Value of Chemical and Fertilizer Imports, 1956, 1960-63

[Millions of dollars]

Commodity	1956	1960	1961	1962	1963
Principal organic chemicals	(1)	0.1	0.4	0.7	0.8
Principal inorganic chemicals	3.0	2.7	2.7	2.8	3.1
Bulk disinfectants, insecticides, fungicides	1.1	1.9	1.9	2.0	2.7
Principal fertilizers	1.7	3.1	3.9	4.6	4.6
Dyes	.5	.7	.7	.9	1.3
Miscellaneous chemicals	.3	.4	.5	.5	.6

[1] Less than $50,000.

Table 11.—Value of Imports of Packaging, Handling, and Conveying Equipment, 1956, 1960-63

[Millions of dollars]

Product	1956	1960	1961	1962	1963
Packaging, filling, and cleaning equipment	0.2	0.3	0.7	0.5	0.7
Materials handling equipment	.4	.3	.3	.3	.5
Conveying equipment	1.0	.4	.7	.6	.5

Table 12.—Value of Imports of Diesel and Gasoline Engines, 1956, 1960-63

[Millions of dollars]

Product	1956	1960	1961	1962	1963
Automotive gasoline engines	0.2	0.2	0.4	0.5	1.0
Automotive diesel engines	.1	1.7	.9	2.3	3.4
Stationary and marine gasoline engines	.2	(1)	.1	.1	.1
Stationary and marine diesel engines	.6	1.2	1.0	1.1	1.0

[1] Less than $50,000.

Table 13.—Value of Selected Electrical Equipment Imports, 1956, and 1960-63

[Millions of dollars]

Product	1956	1960	1961	1962	1963
Rotary generators and converters, total	0.7	0.6	0.6	0.5	0.9
Industrial transformers, total	.6	.1	.2	.6	.5
Electrical supplies for home and industrial use, i.e., switches, relays, circuit breakers, voltage regulators, outlets, and control panels, total	1.7	1.3	1.7	1.9	2.2

Table 14.—Value of Imports of Communications and Related Equipment, 1956, 1960-63

[Millions of dollars]

Product	1956	1960	1961	1962	1963
Radar and similar equipment	(1)	(1)	(1)	0.3	0.1
Receivers and transmitters (not for home entertainment for radio, and television	.4	.4	.3	.5	.5
Radio tubes, (receiving and transmitting	.3	.3	.2	.3	.4

[1] Less than $50,000.

Table 15.—Value of Copper and Aluminum Imports, 1956, 1960-63

[Millions of dollars]

Commodity	1956	1960	1961	1962	1963
Aluminum bars	(1)	0.2	0.2	0.2	0.2
Aluminum sheets	.4	.7	.8	.7	2.1
Laminated copper bars	—	.8	.6	.8	2.5
Copper sheets	.5	.7	.6	.5	.6

[1] Less than $50,000.

Table 16.—Value of Textile Imports, 1956, 1960-63

[Millions of dollars]

Item	1956	1960	1961	1962	1963
Fabric					
Coated and impregnated	0.4	0.7	0.7	0.7	1.2
Synthetic knitted piece goods	(1)	.2	.4	.4	.7
Mechanical embroidery piece goods	1.2	1.2	1.5	.7	1.1
Synthetic	.8	2.5	2.9	3.9	2.8
Artificial Fibers	3.6	14.2	13.8	12.0	12.0
Woolen	3.4	2.9	2.1	2.3	2.5
Cotton	13.0	13.2	12.8	11.7	11.9
Yarns					
Synthetic fiber	.7	.5	.4	.8	1.4
Cellulose fiber	(1)	2.0	2.5	3.0	3.3
Cotton	.7	1.7	1.3	2.1	2.0
Artificial Fiber	.1	1.6	.9	1.1	1.5
Artificial Textile Fiber	1.2	1.6	1.4	2.2	3.3

[1] Less than $50,000.

Table 17.—Value of Primary Paper Imports, 1956, 1960-1963

[Millions of dollars]

Product	1956	1960	1961	1962	1963
Paper pulp, coniferous, dry (not more than 40% water)	1.3	1.2	1.5	1.5	1.3
Waste paper, newspaper, cartons, other paper for manufactured paper	.7	.3	.9	.8	.7
Newsprint	.8	.4	.5	.6	.6
Kraft paper	1.3	1.3	1.3	1.3	2.0
Miscellaneous paper	1.3	3.0	2.5	2.6	3.2
Cardboard for offices, stores	(1)	.4	.8	1.1	.3

[1] Less than $50,000.

Table 18.—Value of Rubber and Rubber Products Imports, 1956, 1960-63

[Millions of dollars]

Product	1956	1960	1961	1962	1963
Synthetic and natural nonvulcanized rubber	0.3	0.7	0.6	1.5	1.5
Nonhardened vulcanized rubber in sheets, rools	.2	.5	.3	.3	.4
Rubber conveyer belts	.7	.9	2.1	.9	1.1

Table 19.—Average Temperatures and Annual Rainfall in Selected Cities

City	Temperature		Annual rainfall, inches
	Average daily minimum °F	Average daily maximum °F	
Casablanca	55.0	72.1	16.0
Marrakech	54.1	81.7	9.5
Agadir	56.0	75.6	8.9
Meknes	50.4	74.8	22.6
Tangier	57.4	68.5	34.9
Kenitra	51.0	76.1	23.4

Source: Based on data from Ministry of National Economy, *Tableaux Economiques du Maroc 1915-1959*, Rabat, 1960.

Table 20.—Population Growth, 1936, 1952, 1956, 1960, 1964, 1970

Year	Moroccans	Foreigners	Total
1936[1]	6,820,000	250,000	7,070,000
1952[2]	8,780,000	545,000	9,325,000
1956[3]	9,750,000	490,000	10,240,000
1960[4]	11,230,000	395,000	11,625,000
1964[3]	12,800,000	303,000	13,103,000
1970[5]	15,400,000	200,000	15,600,000

[1] Based on 1936 census for former Southern Zone only and extrapolated to include all of Morocco.

[2] Based on 1952 census for former Southern Zone and on 1951 census for Tangier and former Northern Zone.

[3] Estimate.

[4] Based on 1960 census.

[5] Estimate based on a Moroccan population growth rate of 3% per year through 1966 and 3.2% from 1967 through 1970.

Table 21.—Urban and Rural Population, 1960, 1964

Year	Urban population	Rural population	Total population
1960, total[1]	3,409,000	8,216,000	11,625,000
Moroccan	3,066,000	8,164,000	11,230,000
Foreign	343,000	52,000	395,000
1964, total[2]	4,025,000	9,078,000	13,103,000
Moroccan	3,765,000	9,035,000	12,800,000
Foreign	260,000	43,000	303,000

[1] Based on 1960 census.

[2] Estimate.

Table 22.—Population by Age Groups, 1960,[1] 1964,[2] 1970 [2]

[Percent]

Age group	*Moroccan*			*Foreign*		
	1960	1964	1970	1960	1964	1970
0-19	51	51	52	23	20	15
20-39	26	27	29	32	30	28
40-59	16	14	13	35	40	47
60 and over	7	8	6	10	10	10

[1] Based on 1960 census.

[2] Estimate.

Table 23.—Estimate of Active Population by Industry Group, 1964

Industry group	Moroccan	Foreign
Professional	77,000	23,000
Management	7,500	8,000
Merchants	175,000	13,000
White collar	35,000	19,000
Agricultural, fishing, and forestry	1,890,000	13,000
Mining and quarrying	31,000	1,000
Transport and communications	52,000	7,000
Handicrafts	370,000	29,000
Service	240,000	15,000
Others	280,000	6,000
Total	3,157,500	134,000

Table 24.—Selected Moroccan Ports, Quantity of Exports and Imports, 1963

[In tons]

Port	Import	Export	Total
Casablanca	2,025,604	8,198,674	10,224,278
Safi	35,505	3,076,139	3,111,644
Mohammedia	1,011,035	142,212	1,153,247
Kenitra	114,446	404,831	519,277
Tangier	120,484	100,651	221,135
Agadir	25,372	85,855	111,227
El Jadida	389	36,023	36,412
Essaouira	3,534	24,689	28,223

Table 25.—Cargo Movement, Port of Casablanca, by Selected Categories, 1952, 1956, 1960, 1963

Category	1952	1956	1960	1963
General cargo	2,569,774	2,191,880	2,373,249	2,508,145
Grain elevators	182,210	408,698	346,474	369,703
Petroleum	960,460	1,198,937	964,384	385,822
Coal	112,338	82,914	93,744	124,355
Ores except phosphates	970,622	714,672	614,539	250,860
Phosphates	3,248,478	4,722,109	6,506,768	6,585,393
Total	8,043,882	9,319,210	10,899,158	10,224,278

Table 26.—Number of Ships Entering Casablanca and Their Tonnage, 1939, 1948, 1952, 1956, 1960, 1963

Year	*Number of ships*	*Gross registered tons*[1]
1939	2,315	9,188,222
1948	2,310	7,470,287
1952	4,081	13,062,255
1956	4,582	15,973,429
1960	5,009	17,916,492
1963	4,858	18,229,523

[1] A registered ton equals a volume of 100 cubic feet.

U.S. DEPARTMENT OF COMMERCE—FIELD OFFICES

ALBUQUERQUE, N. MEX., 87101, U.S. Courthouse. Phone: 247-0311.

ANCHORAGE, ALASKA, 99501, Rm. 306, Loussac-Sogn Building. Phone: BR 2-9611.

ATLANTA, GA., 30303, 75 Forsyth St., N.W. Phone: JAckson 2-4121.

BALTIMORE, MD., 21202, Rm. 305 U.S. Customhouse, Goy and Lombard Sts., Phone: PLozo 2-8460 Ext. 2784.

BIRMINGHAM, ALA., 35203, Title Bldg., 2030 Third Ave., North. Phone: 325-3131.

BOSTON, MASS., 02110, Room 230, 80 Federol St. Phone: CApitol 3-2312.

BUFFALO, N.Y., 14203, 504 Federal Bldg., 117 Ellicott St. Phane: TL 3-4216.

CHARLESTON, S. C., 29401, No. 4 North Atlontic Whorf. Phone: 722-6551.

CHARLESTON, W. VA., 25301, 3002 New Federal Office Bldg., 500 Quarrier St. Phone: 343-6196.

CHEYENNE, WYO., 82001, 207 Mojestic Bldg., 16th & Capital Ave. Phane: 634-2731.

CHICAGO, Ill., 60604, 1486 New Federol Bldg. 219 S. Dearborn St., Ph: 828-4400

CINCINNATI, OHIO, 45202, 8028 Federol Office Bldg., 550 Moin St. Phane: 381-2200.

DALLAS, TEX., 75202, Room 1200, 1114 Commerce St. Phone: RIverside 9-3287.

DENVER, COLO., 80202, 142 New Custom House, 19th & Stout St. Phone: 534-4151.

CLEVELAND, OHIO, 44101, 4th Floor, Federal Reserve Bank Bldg., Eost 6th St. & Superior Ave. Phone: 241-7900.

DES MOINES, IA. 50309, 1216 Paromaunt Bldg., 509 Grond Avenue, Phone: 284-4222.

DETROIT, MICH., 48226, 445 Federal Bldg. Phone: 226-6088.

GREENSBORO, N. C., 27402, Room 407, U.S. Post Office Bldg. Phone: 273-8234.

HARTFORD, CONN., 06103, 18 Asylum St. Phone: 244-3530.

HONOLULU, HAWAII, 96813, 202 Internationol Sovings Bldg., 1022 Bethel St. Phone: 58831.

HOUSTON, TEX., 77002, 5102 Federol Bldg., 515 Rusk Ave. Phane: CA 8-0611.

JACKSONVILLE, FLA., 32202, 512 Greenleaf Bldg., 204 Loura St. Phone: ELgin 4-7111.

KANSAS CITY, MO., 64106, Room 2011, 911 Wolnut St. Phone: BAltimore 1-7000.

LOS ANGELES, CALIF., 90015, Room 450, Western Pacific Bldg., 1031 S. Broodway. Phone: 688-2830.

MEMPHIS, TENN., 38103, 345 Federol Office Bldg., 167 N. Moin St. Phone: 534-3214.

MIAMI, FLA., 33130, Rm. 1628, Federol Office Bldg., 51 S.W. 1st Ave. Phone: 350-5267.

MILWAUKEE, WIS., 53203, Straus Bldg., 238 W. Wisconsin Ave. Phone: BR 2-8600.

MINNEAPOLIS, MINN., 55401, Room 304, Federal Bldg., 110 S. Fourth St. Phone: 334-2133.

NEW ORLEANS, LA., 70130, 1508 Masanic Temple Bldg., 333 St. Chorles Ave. Phane: 527-6546.

NEW YORK, N.Y., 10001, 61st Fl., Empire Stote Bldg., 350 Fifth Ave. Phone: LOngocre 3-3377.

PHILADELPHIA, PA., 19107, Jefferson Bldg., 1015 Chestnut St. Phane: WAlnut 3-2400.

PHOENIX, ARIZ., 85025, New Federal Bldg., 230 N. First Ave. Phone: 261-3285.

PITTSBURGH, PA., 15222, 1030 Park Bldg., 355 Fifth Ave. Phone: 644-2851.

PORTLAND, OREG., 97204, 217 Old U.S. Courthause, 520 S. W. Marrison St. Phone: 226-3361.

RENO, NEV., 89502, 1479 Wells Ave. Phone: FA 2-7133.

RICHMOND, VA., 23240, 2105 Federal Bldg., 400 North 8th St. Phone: 649-3611.

ST. LOUIS, MO., 63103, 2511 Federal Bldg., 1520 Morket St. Phone: MAin 2-4243.

SALT LAKE CITY, UTAH, 84111, 3235 Federal Bldg., 125 So. Stote St. Phone: 524-5116.

SAN FRANCISCO, CALIF., 94102, Room 9453, Federol Building, 450 Golden Gote Ave. Phone: 556-5868.

SANTURCE, PUERTO RICO, 00907, Room 628, 605 Condada Ave. Phone: 723-4640.

SAVANNAH, GA., 31402, 235 U.S. Courthouse ond Post Office Bldg., 125-29 Bull St. Phone: ADams 2-4755.

SEATTLE, WASH., 98104, 809 Federol Office Bldg., 909 First Ave. Phone: MUtual 2-3300.

Revised July 1964.

PENN STATE UNIVERSITY LIBRARIES
A0000071288796

Get on the right track!

Sales opportunities by the hundreds are reported each week in the news magazine, INTERNATIONAL COMMERCE. Business by the trainload—the results of completed foreign sales negotiations—moves through our ports each week to customers abroad. Are your shipments among them?

SUBSCRIBE NOW TO

INTERNATIONAL

COMMERCE

Subscription Form

Please enter my subscription to *International Commerce*.

- ☐ **Annual subscription, $16.00**
- ☐ **Via domestic airmail, $25.00 additional**
- ☐ **Foreign mailing, $5 additional**

NAME _____

ADDRESS _____

CITY _____ *STATE* _____

Mail to Sales Promotion Staff, Office of Publications, U.S. Department of Commerce, Washington, D.C. 20230. Enclose check or money order payable to the Superintendent of Documents.